

● THE B2B TECHNOLOGY DEMAND PLAYBOOK

Get on the **shortlist** before sales calls.

A practical guide for B2B technology, IT services and SaaS companies that want to reach buying committees, earn a place on the shortlist and turn interest into qualified pipeline.



Brandon Delardes
Founder & Director, Base Digital

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● TECHNOLOGY WHITEPAPER

The B2B Technology Demand Playbook

How technology buyers research and shortlist vendors today, and a practical plan to reach them at every stage, from first search to signed contract.



Brandon Delardes, Founder, Base Digital · Brisbane · Published October 2026

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1. How B2B technology buyers decide

Buying technology is a considered, shared decision. A new platform, managed service or SaaS tool touches budgets, security, existing systems and the people who will use it every day. Getting it wrong is expensive, so buyers take their time.

Much of that time is spent on their own. Before a buyer fills in a demo form or replies to a sales email, they have usually searched for the problem and the category, read vendor websites and comparison pages, checked review sites, asked peers on LinkedIn and, increasingly, asked an AI assistant such as ChatGPT or Google's AI Overviews which vendors to consider.

The short version: by the time a buyer talks to sales, the shortlist is often already set. Your marketing has to earn a place on it during research, then help sales move the whole buying committee to a decision.

Who is in the buying committee

B2B technology marketing rarely speaks to a single buyer. Several people influence the decision, and each has a different question that needs a clear answer.

- **Technical evaluators** want to know how it works: integrations, security, architecture, documentation and implementation effort.
- **Business owners and end users** care about the problem being solved, ease of use and what changes for their team.
- **Executive sponsors** look for strategic fit, risk, return on investment and confidence in the vendor.
- **Procurement and finance** focus on pricing, contract terms, compliance and total cost of ownership.

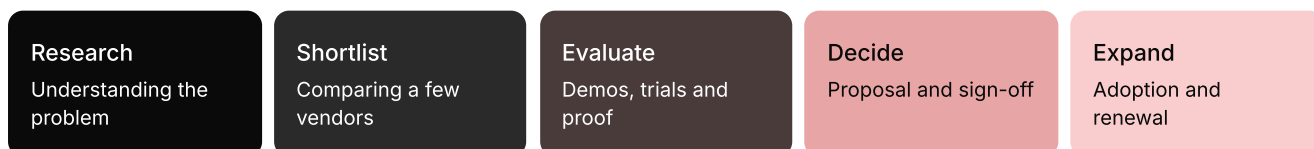
Where technology buyers research

Buyers move between channels constantly. The technology companies that grow pipeline are visible, consistent and credible everywhere the committee looks.

CHANNEL	WHAT BUYERS USE IT FOR
Google search	Researching problems, solution categories, comparisons, alternatives and pricing.
AI assistants	Asking for shortlists and summaries, such as "best managed security providers for mid-sized businesses".
Your website	The deciding resource. Buyers judge clarity, proof, technical depth and how easy it is to book a demo.
LinkedIn	Following thought leaders, checking a vendor's people and seeing what peers recommend.
Review and partner sites	Validating claims through customer reviews, partner directories and marketplaces.
Sales conversations	Demos, trials and proposals, where the shortlist becomes a decision.

2. The buying journey, stage by stage

Mapping the journey makes it clear what buyers need from you at each point, which channels matter, and what to measure.



STAGE	WHAT BUYERS NEED	KEY CHANNELS	MEASURE
Research	Clear explanations of the problem and category, and a reason to remember your name.	SEO, AI search, LinkedIn, content	Organic visits, branded searches, AI mentions
Shortlist	Honest comparisons, use cases, proof from similar customers and visible pricing or packaging.	Website, Google Ads, remarketing	Engaged accounts, MQLs
Evaluate	An easy way to book a demo or start a trial, plus technical detail for evaluators.	Website, email, sales	Demos booked, trials started, SQLs
Decide	Business cases, security and compliance answers, and reassurance for every stakeholder.	Sales, email, content	Opportunities, win rate
Expand	Fast time to value, onboarding support and reasons to grow the relationship.	Email, customer success, events	Renewals, expansion revenue

3. Five foundations of B2B demand

Before adding more campaigns or budget, make sure these five foundations are in place. Each one makes every other channel work harder.

01 A website that explains what you do, clearly

Buyers should understand who you help, what problem you solve and why you're different within seconds. Give each product, use case and industry its own page, and make booking a demo or starting a trial obvious on every page.

02 Visibility in search and AI for your category

Rank for the solution, category, comparison and "alternative to" searches buyers use. Structure pages with clear answers and schema so AI assistants describe your product accurately and include it in their shortlists.

03 Thought leadership with real substance

Useful guides, opinions and practical advice from your own experts build trust with technical buyers. Publish on your site first, then share it through LinkedIn and email so it reaches the whole buying committee.

04 Marketing and sales on the same page

Agree what counts as an MQL and an SQL, how fast leads are followed up and what happens when a lead isn't ready. Shared definitions stop arguments about lead quality and make pipeline easier to forecast.

05 Measurement from click to closed revenue

Connect website, ad and form data with your CRM, so every demo, opportunity and deal can be traced back to the activity that started it. That is the only way to invest with confidence in long sales cycles.

4. A 12-month demand calendar

B2B demand works best as an always-on presence with planned pushes. Adapt this outline to your own product launches, events, financial year and sales targets.

ALWAYS ON · ALL YEAR

SEO and content updates, AI search visibility, brand and category search ads, remarketing to recent visitors, and regular LinkedIn posts from your company and your experts.

QUARTER 1 · PLAN AND ALIGN

Agree pipeline targets, MQL and SQL definitions and budgets with sales. Audit your website, tracking and CRM so the year starts with clean data.

EACH QUARTER · ONE FLAGSHIP CONTENT PIECE

Publish a substantial guide, report or webinar on a problem your buyers care about. Build supporting articles, ads and emails around it, and give sales a reason to reach out.

AROUND LAUNCHES AND EVENTS

Run focused campaigns for new products, features, partner programs and industry events, with dedicated landing pages and follow-up for everyone who engages.

BEFORE BUDGET AND FINANCIAL YEAR CYCLES

Many buyers plan spend around their financial year. Increase demand capture and sales outreach to engaged accounts in the months before budgets are set.

END OF EACH QUARTER AND YEAR

Review MQLs, SQLs, opportunities and revenue by channel with sales. Keep what worked, cut what didn't, and set the plan and budget for the next period.

5. Getting shortlisted by AI assistants

More buyers now ask AI assistants to suggest vendors, compare options or explain a category. These tools draw on your website and what others say about you, so you need to give them clear, consistent information to work with.

- **Answer category questions directly.** Explain what your solution is, who it's for and how it compares, in plain language near the top of key pages.
- **Be consistent everywhere.** Keep product names, descriptions and capabilities the same across your site, review sites, marketplaces and partner directories.
- **Use structured data.** Organisation, product and FAQ schema help machines understand who you are and what you offer.
- **Check regularly.** Ask ChatGPT and Google's AI the questions your buyers ask, note how you're described and fix the gaps.

6. Measuring pipeline, not just leads

Long sales cycles make B2B technology marketing harder to measure, but not impossible. Focus on a small set of metrics that connect marketing activity to pipeline and revenue.

METRIC	WHY IT MATTERS
MQLs by source	Shows which channels bring the right kind of interest into your funnel.
MQL to SQL rate	Your clearest signal of lead quality, and whether marketing and sales agree on fit.
Demos booked and trials started	The moments buyers move from research to serious evaluation.
Cost per SQL and per opportunity	Compares channels fairly on what sales values, not on cheap form fills.
Pipeline and revenue by source	The true measure of value. Connect marketing data with your CRM to see it.
Branded search and AI mentions	Early signs that awareness and reputation in your category are growing.

Tip: add a "How did you hear about us?" field to your demo form and have sales confirm it on the first call. Combined with digital tracking, it fills in the gaps that long, multi-person journeys leave.

7. The 20-point demand checklist

Work through this list. Anything you can't tick is an opportunity.

CHECK	AREA
1 Your homepage says who you help and what you solve within seconds	Website
2 Booking a demo or starting a trial is easy from every page	Website
3 Each product, use case and industry has its own clear page	Website
4 Customer proof and pricing or packaging guidance are easy to find	Website
5 You rank for your main category and comparison searches	Search

	CHECK	AREA
6	You have honest comparison and "alternative to" pages	Search
7	Key pages answer buyer questions in the first few sentences	Search & AI
8	Organisation, product and FAQ schema are on your key pages	Search & AI
9	You've checked how ChatGPT and Google's AI describe your product	AI
10	Your details match across review sites, marketplaces and partner listings	AI
11	You publish at least one substantial content piece each quarter	Content
12	Your experts share useful thinking regularly on LinkedIn	Content
13	Search campaigns target category, problem and competitor terms	Campaigns
14	Remarketing reaches recent visitors and engaged accounts	Campaigns
15	Marketing and sales share written MQL and SQL definitions	Alignment
16	Demo requests are followed up within one business day	Alignment
17	Leads not ready for sales go into a nurture sequence	Follow-up
18	Trial users get onboarding emails that lead them to value	Follow-up
19	MQLs, SQLs, opportunities and revenue are tracked by source in your CRM	Measurement
20	Results are reviewed with sales every quarter to set the next plan	Measurement

WORK WITH BASE DIGITAL

Want to know where your pipeline stands?

Base Digital is an independent, owner-led Brisbane digital marketing agency. We help technology businesses get found by the right buyers, earn a place on the shortlist and build qualified pipeline. We'll review your marketing against this checklist and show you the biggest opportunities for the next year, with no lock-in contracts and no hard sell.

calendly.com/base-digital
hello@basedigital.com.au

0401 048 471

36 Warry Street, Fortitude Valley QLD