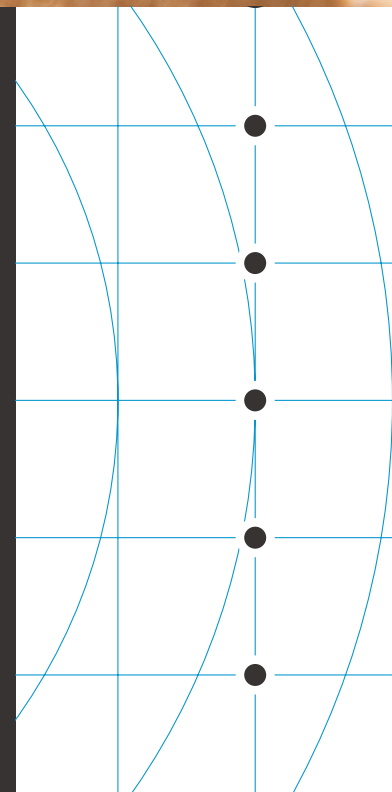




# B2B Digital Campaign Measurement & Optimization

## An Overview of the Basics and Best Practices

Understand the metrics that matter and the fundamentals of data-driven iteration to improve B2B digital marketing success.



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# Creating great content and great campaigns is only part of the equation.

Marketing teams thrive when they're armed with great data insights — and for good reason. Without measurement and optimization, the value of marketing is theoretical. Unsurprisingly, when ROI questions are posed, theoretical value and the vague feeling that the work was great don't usually cut it.

The issue is, while few marketers discount the value of data and testing, many find themselves unable to get their hands on metrics that make a difference. In fact, that's particularly true among B2B marketers.

When you pair marketing data confusion with the complex service offerings and long sales cycles of most B2B organizations, the result is many marketing teams make single data-driven campaign decision: Do we leave it running or turn it off?



## 1/3 of B2B marketers

say they don't have data good enough to make an impact.<sup>1</sup>

## 1/4 of B2B marketers

with usable data say they don't know how to act on it.<sup>1</sup>

<sup>1</sup> 48 B2B Marketing Stats to Know This Year – 2024, Hubspot

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With B2B brands spending half as much on marketing compared to B2C brands — represented as a percentage of revenue<sup>2</sup> — B2B marketers have a smaller margin for error. But, with larger deal sizes, there is more opportunity for success when digital marketing strategies become more dialed in and optimized through measurement.

If you're like many B2B marketers, you're looking to build a solid foundation to begin measuring and optimizing your campaigns, website experiences and other assets more effectively. In this guide, we pull from AvreaFoster's 30+ years of B2B marketing experience to provide just that — a way to approach digital marketing metrics and the process of iteration that makes it all manageable.

### TO HELP YOU STREAMLINE THE JOURNEY TO OPTIMIZATION MASTERY, THIS GUIDE WILL DISCUSS:

- The Opportunities and Challenges of B2B Marketing Metrics
- The Marketing Metrics That Matter, Organized By Funnel Stage
- Why B2B Marketing Optimization Matters
- Campaign Optimization Best Practices
- Marketing Test Suggestions, Organized By Pre- vs. Post-Click Engagement
- The Advantages of Partnering with an Agency for Marketing Optimization

<sup>2</sup> 6 Crucial B2B Marketing Statistics - 2024, Backlinko

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# 75%

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of large B2B organizations outsource their content marketing efforts<sup>3</sup>. Within that group.

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# 84%

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outsource content creation<sup>3</sup>, but only...

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# 31%

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outsource distribution.<sup>3</sup>

<sup>3</sup> 24 Must-Know B2B Marketing Statistics for 2025, Lead Forensics

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### WHY DO B2B COMPANIES STRUGGLE WITH CAMPAIGN OPTIMIZATION?

One reason is that they outsource content creation, but not distribution or measurement.

That represents a disconnect between the teams developing strategies and the teams deploying those strategies, creating dissonance that clouds results. What's more, in most cases, measurement and optimization are left to internal teams, which often set aside those tasks in favor of responsibilities that contribute more overtly to growth.



# Measurement

## Measurement in B2B marketing has never been more important.

While proving a tangible return on marketing investments has always been a priority, this cross-industry survey result indicates that the heat is on to justify budgets. As that pressure ratchets up, marketers must lean on data analysis to do what it does best — identify successes and illuminate opportunities.

This is complicated by several factors; namely, that B2B marketing is defined by long sales cycles, large buying committees and complex service offerings. Because of this, creating a clear line from digital campaign through to a closed piece of business is murky — especially if marketing and sales do not agree on what is a true lead.

One of the other major challenges for B2B marketers looking to prove out ROI is the issue of too much data.

# 70%

of B2B marketers report increased pressure to prove ROI.<sup>4</sup>

<sup>4</sup> The 8th Edition State of Marketing Report, Salesforce



“The skill of data storytelling is removing the noise and focusing people’s attention on the key insights.”

**BRENT DYKES,**  
**DATA STRATEGY CONSULTANT AND**  
**AUTHOR, “EFFECTIVE DATA STORYTELLING”**



# Don't drown in the sea of data.

Data is not a scarce commodity in today's era of digital marketing. On one hand, it never has been easier to gain complete visibility into every aspect of B2B marketing performance. On the other hand, marketers have access to so many metrics across disparate platforms and dashboards that it actually can inhibit effective measurement and optimization.

With marketers leaning on an average of 18 data reporting sources<sup>4</sup>, this deluge of data points can result in paralysis instead of analysis. With all of that input, it's vitally important that B2B digital marketers are able to explain the why behind the numbers — the fact-based story that puts insights in context and brings opportunities for improvement to light.

## Only 20%

of insight analytics will deliver business outcomes.<sup>5</sup>

<sup>5</sup> 10 best practices for analytics success (including 3 you can't ignore), MIT Sloan Management School

## TIPS FOR CRAFTING A MARKETING RESULTS STORY

In addition to measurement and optimization, digital marketing metrics also are an important resource for telling the story of your campaigns. Especially when the audience includes stakeholders that are less digital marketing-savvy, the data you choose to present and how you choose to present it can mean the difference between engagement and confusion.

### A FEW KEY CONSIDERATIONS:

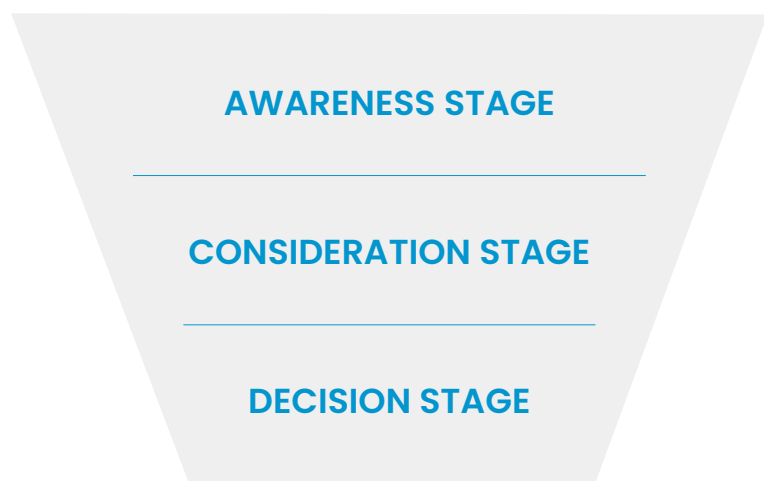
1. **Understand the stakeholder group** to which you're presenting your story and what they care about. That might mean having a few variations of your report that spotlight different data points. Just remember: Sales leadership may have different priorities and data literacy levels than your C-Suite, for instance.
2. **Never rely on vanity metrics.** With such a deep well of data points to pull from, it can be tempting to cherry-pick those that paint an initiative in the most positive light. Instead, choose the metrics that you can stand by every month. There is nothing more suspicious than reports that present indefinite growth and inconsistent measurables.
3. **Create consensus around what constitutes a lead.** That means facilitating marketing and sales collaboration. Remember: You're all on the same team and when you agree on what a lead is, you're better primed to celebrate collective success.
4. **Marketing reports are still a marketing asset** – Use design and content strategy best practices to make your reports engaging and easy to understand.



# A funnel stage-based approach to data analysis

So, how do you decipher the difference between the data that's truly meaningful and the data that is more ancillary? There are numerous ways to segment data, but separating metrics by funnel stage is our recommendation when taking all stakeholders into account. Funnel-stage segmentation is a great way to touch on key marketing-related KPIs and align them from the beginning of the buyer's journey to its conclusion.

When ROI pressure is high, data and analytics need to be tethered to reality. This aligns marketing measurables with a user's actual progress through the funnel and inherently reinforces marketing and sales alignment, since it requires an agreement on what constitutes a lead.



— **THE STATS SUPPORT A FUNNEL-BASED APPROACH, TOO.**

**80%**

of B2B buyers are more likely to convert when their experience is somewhat personalized.<sup>6</sup> Executing on that requires a deep understanding of what your audience wants during each funnel stage. One size fits few, so detailed measurement is key.

**84 days**

is the average length of a B2B sales cycle with a well-developed sales funnel.<sup>7</sup> Given that best-case length of time, B2B digital marketers have to be aware of where leads are in the process and also where they're falling off.

<sup>6</sup> State of the Connected Customer Report, Salesforce

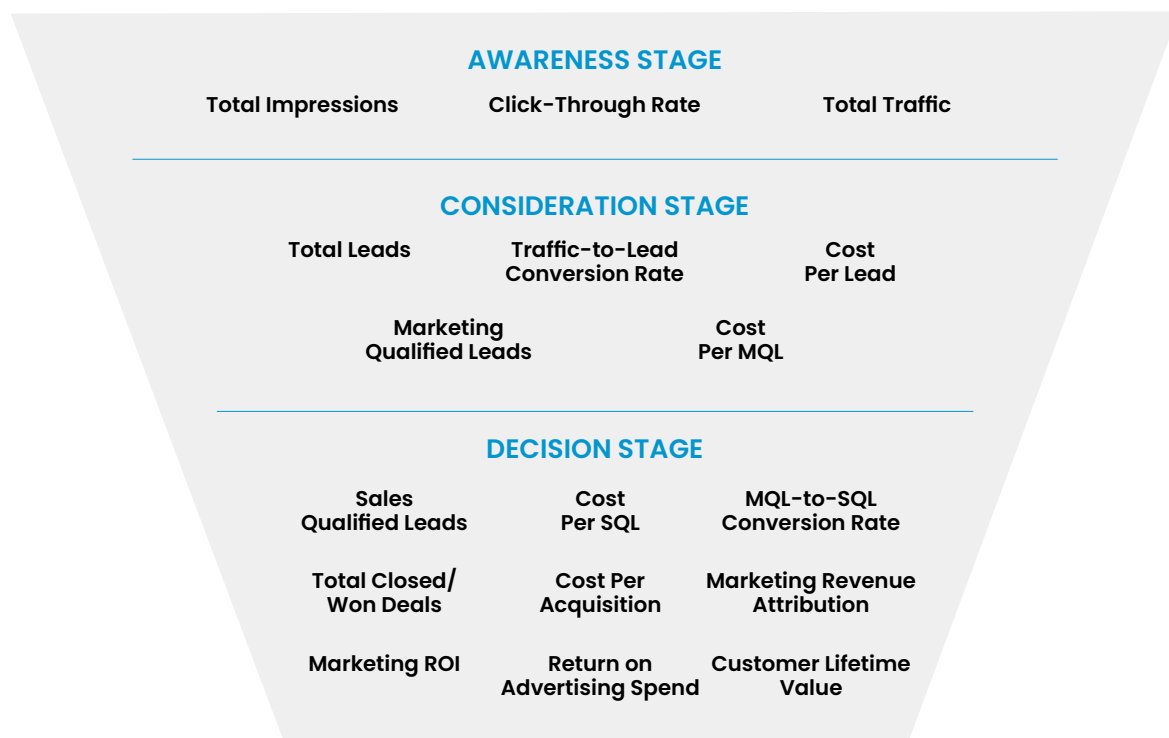
<sup>7</sup> A Spark of B2B: Top 10 B2B Marketing Statistics to Consider for 2024, Medium



# B2B marketing metrics by funnel stage

To be clear, this list of marketing metrics separated by funnel stage does not include the more granular data points you'd consider on a channel-by-channel basis. That is intentional. For the purpose of broad application, we're striving for a metric set that provides comprehensive coverage and avoids metrics that are highly dependent on a unique campaign strategy, specific sales cycle or particular channel.

Again, across all of these metrics, consider the totals as well as source-by-source and campaign-level data.



## WHY THESE METRICS?

There are four key reasons why we recommend these as the B2B marketing metrics that really matter:

1. They comprehensively track the journey from initial impression through closed business.
2. They prioritize calculating ROI, but also emphasize the importance of considering a customer's lifetime value.
3. They require communication, collaboration and alignment between marketing and sales.
4. Outside of creating a consensus around what constitutes a qualified lead, there essentially is no subjectivity to be found in this list.

# Only 50%

of B2B marketing teams say sharing data with other teams is an easy task.<sup>8</sup> Using key metrics to reinforce alignment helps address that challenge

<sup>8</sup> 48 B2B Marketing Stats to Know This Year - 2025, Hubspot



# Breaking down the stages

What you might notice first is that as the funnel narrows, the amount of metrics we prioritize actually grows. That's very intentional, since our recommended set of measurables is focused on the user-to-lead transition and highly provable ROI.

The philosophy we intend to communicate is:

- Don't overanalyze when your audience is largest. At the top of the funnel, focus on the most clear indicators of campaign success and perform tests to optimize against those select stats.
- Mid-funnel is about lead qualification. With enough budget, any business can generate volume in the awareness stage. It requires more nuance and strategy to transition users to marketing qualified leads.
- Marketers need to determine value in a multitude of ways — from closed business to advertising-specific returns to the lifetime value of a new customer. Marketers also need to care about what their sales team considers a lead.

## AWARENESS STAGE

We are focused on capturing attention at this stage, so our key metrics are related to reach volume and immediate ad success.

- **Impressions:** the number of views an asset received.
- **Click-Through Rate (CTR):** the percentage of recipients who click on a specific link, ad or call-to-action (CTA) after seeing it. Consider in direct relation to impressions.
- **Total Traffic:** the number of visitors driven to a website, landing page or other digital destination.

## CONSIDERATION STAGE

Here, our focus shifts to lead generation and lead quality. It's imperative that the marketing team has clearly defined rules about what constitutes a lead.

- **Total Leads:** the number of visitors who complete a targeted conversion action.
- **Traffic-to-Lead Conversion Rate:** the percentage of visitors who become leads.
- **Cost Per Lead (CPL):** total marketing spend divided by the lead total.
- **Marketing Qualified Leads (MQLs):** leads the marketing team has reviewed and qualified as lucrative prospects.
- **Cost Per MQL:** the total marketing spend divided by the MQL total.



# Breaking down the stages

## DECISION STAGE

Finally, our key metrics at this stage concern closed business deals and attributable ROI. This is where marketing and sales team alignment is vital — they should be celebrating shared successes, not competing for credit.

- **Sales Qualified Leads (SQLs):** leads the sales team has reviewed and qualified as lucrative prospects.
- **Cost Per SQL:** the total marketing spend divided by the SQL total.
- **MQL-to-SQL Conversion Rate:** the percentage of MQLs that become SQLs.
- **Total Closed/Won Deals:** volume of marketing-driven opportunities that become secured deals.
- **Cost Per Acquisition (CPA):** the total advertising or marketing spend divided by the attributed customer total.
- **Marketing Revenue Attribution:** the total revenue generated as an attributable result of marketing efforts.
- **Marketing ROI (MROI or ROI):** calculated by dividing marketing-attributed revenue by total marketing costs.
- **Return on Advertising Spend (ROAS):** calculated by dividing revenue attributed to ads by the dollar amount spent on ads.
- **Customer Lifetime Value (CLV or LTV):** the average revenue a single customer generates over the duration of their engagement with the business.





## Testing & Optimization

### Campaign optimization is critical, particularly in B2B marketing.

Now that your marketing team is armed with insights that can make a difference, what comes next? The answer is testing and optimization.

Digital marketing without data-informed optimization is like throwing darts with your eyes closed. You're making adjustments based purely on intuition rather than insight and not really improving your chances of success. Your campaigns and assets in market need to be optimized based on real feedback from your audience. After all, no one knows what your targets want more than they do and, through the data, they're telling you precisely what is working and what isn't.

Marketers have to be willing to pivot from strategies that aren't working, no matter how much time was spent creating them, and embrace the opportunity to improve.

—  
**THE STATS SUPPORT A FUNNEL-BASED APPROACH, TOO.**

**75%**

of B2B customers prefer a sales experience with no involvement from a representative.<sup>7</sup>

**64%**

of B2B buyers are Millennials or Gen Z.<sup>7</sup>

With these numbers in mind, it's clear that marketing has to carry a heavier burden in exciting and educating prospective customers. Marketers can't shoot for okay and let sales pick up the slack; that thinking has proven to be outdated.

<sup>7</sup> A Spark of B2B: Top 10 B2B Marketing Statistics to Consider for 2024, Medium

“Marketing's job is never done. It's about perpetual motion. We must continue to innovate every day.”

**BETH COMSTOCK,  
FORMER CMO AND VICE CHAIR, GE**



# The challenge: Testing and optimization is easier said than done.

Two of the strongest advantages of digital marketing are the ability to measure performance in great detail and the freedom to make changes on the fly that can be implemented in an instant. However, many digital marketers leverage only half of that duo — collecting data and producing detailed reporting, but stopping short of turning that insight into action.

Instead, they often make only one choice when reviewing campaign data: whether or not to keep the campaign running. But in nearly all cases, there is some success or insight that data reveals that can illuminate the path forward. No matter what, you know more now than you did at the campaign's launch.

So if testing and optimization are so valuable, why is it such a challenge for marketers to carry them out? The answer is simple: time.

## OUR SOLUTION: FOCUS ON A SHORT LIST OF EASY-TO-IMPLEMENT TESTS AND OPTIMIZATIONS.

These tips can help narrow your scope of focus and make testing much more achievable with a limited time investment:

- Prioritize high-impact, fast iteration opportunities. That means homing in on aspects of your assets that can be edited quickly and don't require the involvement of a large team or lengthy approval process to get done.
- Split your optimizations into two groups and think about tackling them individually. We recommend pre-click and post-click categories, as you'll read in a moment.
- Leverage tools to make testing more efficient. From AI tools to heat mapping and in-platform solutions, find solutions that simplify your testing process and fit neatly into your existing workflows. We'll make some recommendations, as well.

# 70%

of marketers say that testing is essential to boosting conversion rates.<sup>9</sup>

# 52%

of companies that don't perform tests say that setting aside time for the effort is the biggest challenge.<sup>10</sup>

<sup>9</sup> The Ultimate List of Marketing Statistics for 2024, Hubspot

<sup>10</sup> A/B Testing Statistics, Techreport



# Our approach to adjustments and testing: pre-click and post-click optimization.

While this list isn't exhaustive, it provides a great place to start with campaign optimization. We like to segment our adjustments into two categories: pre-click and post-click.

The pre-click category includes everything that happens prior to a user's interaction with an ad, ranging from targeting to actual creative. The post-click category covers the experience a user has after they've interacted with an ad, primarily focused on landing page interactivity and identifying the points at which users fall out of our desired journey.

## AD FREQUENCY CAPPING

With any campaign, there is a point of diminishing returns. With ad frequency, that happens when you transition from being top of mind to being a mild annoyance. At the same time, you can't risk making no impression at all. There is no definitive best practice for ad frequency, so test adjustments until you strike your ideal balance.

With ad frequency capping, you can adjust and limit the number of times an individual member of your target audience receives:

- An individual ad
- Ads from a particular campaign
- Any advertising from your brand





# Pre-Click Optimizations

## CREATIVE A/B TESTING

Identify and isolate individual attributes of your creative assets to find what works best for your audience. Test alternate versions of individual attributes against one another over a period of two to eight weeks, really decide which won out (and why), and then let that data inform what you create going forward. Everything from messaging to colors and photos to typography and type size is fair game. The most important note: Change only one variable at a time to ensure accurate results.

## CONSIDER A/B TESTING:

### Visual Elements

- Images vs. Video
- Image Content
- Image Composition
- Color

### Layout Elements

- Type Size
- Type Choice
- Type Placement
- Layout Composition

### Copy Elements

- Headlines
- Body Copy
- Calls to Action
- Use of Social Proof: Testimonials, Ratings, Reviews

## HIGH-PERFORMING ASSET PRIORITIZATION

This is a straightforward tip that gets ignored surprisingly often: When you identify which assets stand out from the crowd, start shifting your ad budget toward the winning formula. Then carry whatever is working with that asset through to work that needs some elevation. Turn one win into several.

Look at your digital marketing initiatives and determine:

- What are my highest-performing ads?
- What are my highest-converting demand gen assets?
- What are my most engaging content pieces?
- What are my most requested offers?

With those answers in hand, double down on what's working.





# Pre-Click Optimizations

## TARGETING AND SEGMENTATION ADJUSTMENTS

As with your market-facing creative, no matter how much strategy informs your targeting and segmentation approach, you have to be willing to pivot when the data starts rolling in. Maybe your targeted titles are too broad or too narrow. Maybe your existing assumptions on peak engagement times are now outdated. No matter what, be open to adjusting targeting and segmentation; you may have the right message reaching the wrong audience.

Targeting and segmentation adjustments to consider include:

- **Demographic Attributes** — Is there an opportunity to limit the age or income level of your audience in order to get in front of more qualified prospects?
- **Behavioral Attributes** — Are there any insights you can glean about your ideal prospect's online behavior that can help you dial in your targeting?
- **Competitor Affinity** — Are there key competitors whose audience you'd like to get in front of more often?
- **Contextual and Temporal Factors** — Home in on the seasonality, weekly behaviors and platform preferences of your highest-converting audience.
- **Search Intent** — Evaluate your keywords against your audience's search terms. Are there opportunities to align keywords with different stages of the buyer's journey?





# Post-Click Optimizations

## LANDING PAGE CONVERSION OPTIMIZATION

Pay attention to conversion rates, time on page, heat-mapping data, scroll-mapping data and any other tools at your disposal to assess the effectiveness of your landing page. Are users confused by the page? Are you asking too many questions on the form? Does the page perform well on mobile? Unlike the rest of your digital real estate, a landing page has a singular goal: to convert. If it isn't converting, start testing adjustments until it is.

In response to user data, consider making adjustments to:

- Content Hierarchy
- Page Length
- Form Complexity
- Copy: Headlines and Body Text
- Image Choice and Placement
- Use of White Space
- Use of Social Proof
- CTA Language, Placement and Frequency

## FULL WEBSITE CONVERSION OPTIMIZATION

Optimizing an entire website is a more complicated task than doing the same for a single landing page, but the same tools of the trade apply. The difference is you have more diverse audiences, a few distinct possible user journeys, and the fact that not every user has the same starting point. If you understand the handful of critical conversions your website is designed to drive, you can work backward from those points and uncover and address the weak links in your website.

When evaluating individual pages of your website, the landing page list above is a great starting point. When looking at your website holistically, consider making adjustments to the following attributes in response to user data:

- Navigation Structure and Page Order
- Breadcrumbs and Search Functionality
- CTA Language Placement and Frequency
- Image Use and Placement
- Video Use and Placement
- Use of Social Proof
- Form Functionality
- SEO Content
- Page-Load Speed
- Mobile-Specific Functionality





# Post-Click Optimizations

## HIGH-PERFORMING CONTENT PRIORITIZATION

**As with** ad creative, the data will tell you explicitly which pieces of website content create value for you and which get ignored. In addition to shining a spotlight on the high achievers, learn from what worked and apply it going forward. Does your audience respond to listicles and advice? Are they looking for innovative thought leadership? Do they respond more to case studies than blog posts? Are they fans of infographics over narratives?

Prioritizing high-performing content also means being intentional about its production — even if your audience gravitates toward content pieces that mean a larger investment. It likely will be more profitable over time to produce fewer assets of great depth compared to a vast library of surface-level content.

## USER DROP-OFF POINT IDENTIFICATION

The drop-off point is the closest thing B2B marketing websites have to cart abandonment. While your website is supposed to seamlessly navigate a user to a conversion action, sometimes the wheels fall off mid-journey. Rather than accepting a website conversion rate as if it's unchangeable, take advantage of user journey-mapping tools to understand where prospects fall off and how you can rescue their experience going forward.

As you evaluate where you're losing users in their digital experience, ask yourself:

- Is my content confusing or not engaging?
- Is there an asset that is loading slowly or improperly?
- Are we not providing a clear-enough next step?
- Is there an expected experience we're not providing?
- Is there a user question we're not answering or not answering quickly?



# Some additional advice before you embark on optimization



## TIP 1: OPTIMIZE, BUT DON'T TINKER.

In addition to your quantitative and qualitative measures of success, a major element of your campaign optimization strategy is frequency. Once you understand all the levers you can pull, there is a natural tendency toward tinkering — making minute adjustments to several aspects of a campaign to see if performance goes up or down. Tests have to be conducted thoughtfully by adjusting only a few choice attributes. The only way to know if a change yields positive results is to isolate it.

For example, if you change the headline and photo in a piece of ad creative, and then make tweaks to targeting, you have no way of knowing which adjustment actually made a difference. So you don't know which change to cascade through the rest of your campaign.

**Do** pick an element, make a change, test the change and determine success.

**Do not** change several elements and guess which made a difference.

## TIP 2: BE MEASURED IN YOUR RESPONSE TO MEASUREMENTS.

Another tendency we see with testing is to underfund the effort and then overreact to the results. Like campaigns themselves, campaign optimizations require time and investment to produce meaningful results. Nothing of significance can be learned overnight, and our general recommendation is to run a test for a **minimum of two weeks** before you determine your next course of action.

An example of overreacting to testing results, particularly after a brief test, might be the following:

You ran an A/B test measuring the success of blue versus gray background colors. Because blue performed 1% better than gray after a few days, you've decided that your marketing team is forbidden from using gray backgrounds going forward. The issues here are that the test was too short, the variable too subjective and the results too nebulous. Just because you ran a test doesn't mean you have to act.

**Do** give your tests a reasonable runway and accept that they might be inconclusive.

**Do not** make sweeping decisions based on small tests or negligible success.

# Digital marketing can be overwhelming. We've got your back.

This guide hopefully provides you with firm footing as you dive deeper into the world of digital marketing metrics and optimizations. However, successful B2B digital marketing comes down to much more than the 1s and 0s.

Digital marketing success happens when your campaign message is aligned with your true differentiators, when marketing and sales are in lockstep on lead qualification and, above all else, when you understand what really matters to your most lucrative audiences.

## THE RIGHT AGENCY MAKES OPTIMIZATION EASY.

We've written at length here about how digital marketing offers clear indicators of success and failure. As such, setting clear goals and identifying success metrics are central to strategy development and campaign refinement at AvreaFoster.

At the same time, our digital strategies aren't created in a vacuum of data. We combine our expertise across digital marketing, brand strategy, creative execution, web development and traditional advertising to engineer plans that actually make a difference.

## LET'S CONTINUE THE CONVERSATION.

If you're interested in digital marketing strategies that actually convert, delivered by a team that actually communicates throughout the process, we'd love to chat.

[Contact AvreaFoster](#) to get started.



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# The pioneering perspective in B2B marketing.

For over 30 years, businesses have trusted AvreaFoster to deliver unmatched results through digital-first brand and marketing strategies. Our experience navigating an array of unique business challenges has honed our approach and resulted in a mindset of contagious curiosity, leading to insights that unlock a B2B brand's full potential.

**BRANDING | DIGITAL MARKETING | CREATIVE | WEB DESIGN | INTERNAL COMMS**



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