Guide & Workbook

AI-FIRST GROWTH FORMULA

FOR REVENUE GROWTH IN 2025

PREPARED BY
Marketing Copilot®

marketingcopilot®
Find Customers. Keep Customers.

Turning Engagement into Revenue

In 2024, the team at Marketing Copilot spoke to over 150 founders, CEOs and sales executives to understand what was driving B2B customer acquisitions.

For technology solution providers in 2024, they relied heavily on existing business and referrals (80%) to achieve their sales goals. Many people we spoke with complained that generating new business; cost 3X's more than it did in 2020/21, took twice as long and traditional tactics, like paid search, were no longer working.

In 2023/24, we had the opportunity to work with 25 technology companies to execute tactics, test assumptions and track results. It was using this data, that we were able to arrive at our formula. We are sharing it here, within this guide.

The team at Marketing Copilot started to experiment with AI in the sales and marketing functions over 24 months ago. We wanted to add speed and scale to this formula. Regardless of the tools you use to execute The Growth Formula, we know it works. And with the addition of Marketing Copilot AI, a recent product development from our team, we make the Growth Formula work 5 times faster than we could before.

Drop us your thoughts about how the Growth Formula has worked for your business. And if you need help developing your plan, please reach out:

info@marketingcopilot.com.

Happy Marketing,

Marie Wiese

Marie Wiese
CEO, Marketing Copilot®
Microsoft MVP

THE MARKETING BASICS

Engaging the Digital Buyer is about building trust...

How do we build trust?

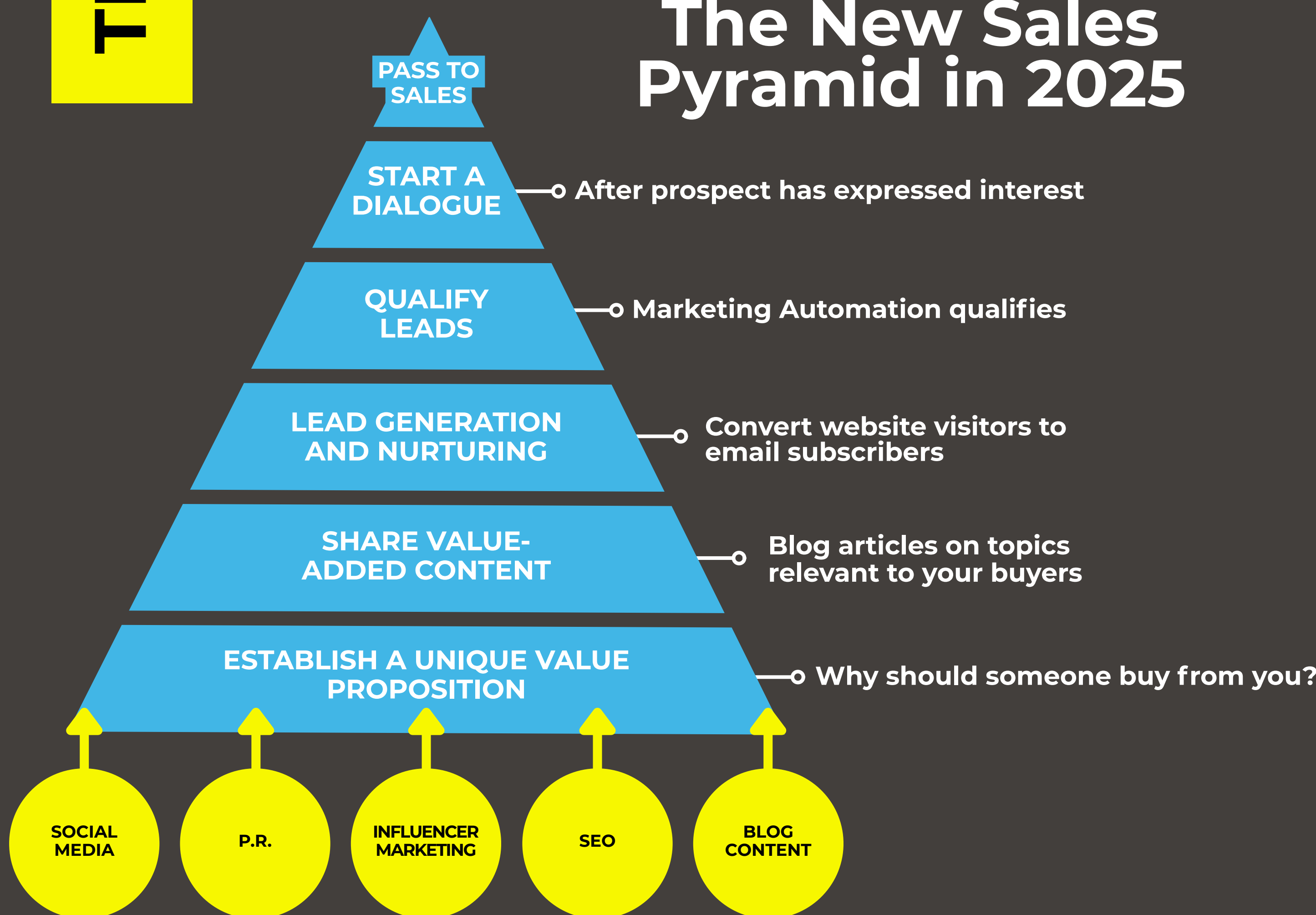
FAMILIARITY
How strong is the recall of your company name in the community you serve?

TRANSPARENCY
Do you give to get? How much value do you offer clients?

LONGEVITY
How old and how stable is your web presence?

CONSISTENCY
Do you try something once and give up? Is there a consistent effort of activity?

The New Sales Pyramid in 2025



The Formula for Revenue Growth

1b(3tx3a) + (3p+3i+3e) = Increased Revenue

b	=	Documented Buyer Persona
t	=	Buyer Triggers
a	=	Attributable Touchpoints
p	=	Partners to Co-Market
i	=	Company Influencers
e	=	Events

Let’s break this down...

$1b\,(3t \times 3a) + (3p + 3i + 3e)$

Let's start here...

$1b\,(3t \times 3a)$ = 1 DOCUMENTED BUYER PERSONA

If you don't know who you are selling to or what their attributes are, you will not only have a hard time finding them but also appealing to them. We are still surprised to see that companies are not documenting their persona types or prioritizing who is at the top of the list and where time, money and resources need to be spent. **A buyer persona is not an industry category, demographic or even job title. It's a precise articulation of problems, success factors and obstacles** your buyer is challenged with making a purchasing decision. The first in the formula is to define your primary persona.

GET THE BUYER PERSONA WORKBOOK

Supercharge with AI

Define hyper-targeted personas using AI-powered insights from real-world data. Move beyond generic marketing personas and start building dynamic, data-rich profiles based on actual customer interactions, online behaviour, and purchasing history. With AI, you can continuously analyze trends, segment audiences in real time, and surface key traits that truly influence buying decisions.

$1b\,(3t \times 3a)$ = 3 BUYING TRIGGERS

A trigger is **what gets your primary persona to search for a solution.** Without triggers, a buyer has no reason to listen to you or look for you. What you do does not matter to prospects, but the problems you are solving for them do.

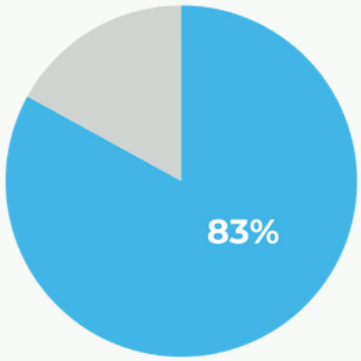
An example of an excellent trigger for an IT Solution company often revolves around a lack of response from their existing provider. If your buyer is triggered to search for you because of response time, you need to talk about this and be prepared to back it up.

As you build your formula, keep two things in mind about the triggers you choose:

1. You must be able to prove you can solve the problem with relevant data and proof points readily available on your website
2. The more you can differentiate yourself while talking about these triggers, with a unique and compelling value proposition, the better.

GET THE VALUE PROPOSITION WORKBOOK

1b (3t × **3a**) **= 3 ATTRIBUTABLE TOUCHPOINTS**



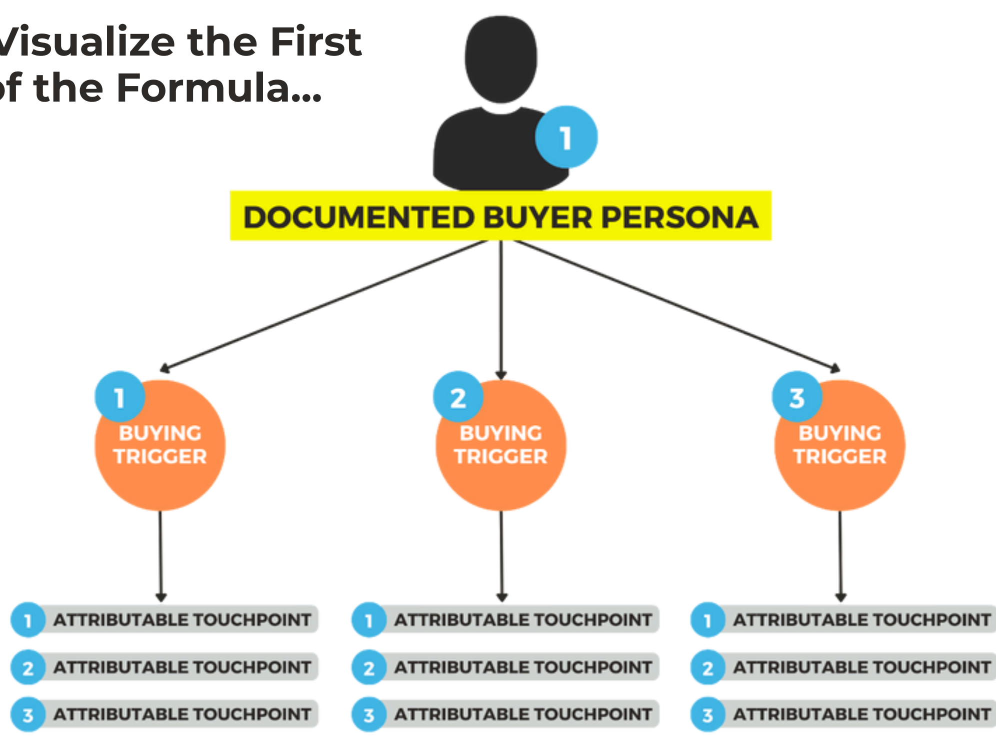
83% of the buyer journey is happening online in ways that are not attributable.

With so much of the buyer journey happening in places you can't see, touch or hear, you need to drive all traffic to a touch point that can be tracked and measured. There are many marketing pundits who believe that attribution was invented to sell marketing automation software. We disagree.

Smart Marketers have always been able to measure results of campaigns, but **the reality of today's digital native is that they are making decisions long before they show up to your website or social profile.**

Your job is to create as many valuable touch-points as possible that allow you to capture an email address or understand what people already in your database are doing. This goes back to personas and triggers. But to make better marketing decisions and spend money wisely, decide what these touchpoints are for every single tactic you execute.

Let's Visualize the First Part of the Formula...



WORKSHEET #1

1b (3t × 3a)

1b

Define your Primary Buyer Persona:

3t

List the 3 most important Buying Triggers that get them searching:

1

2

3

3a

List 3 Attributable Touchpoints you can send them to for each Trigger:

1b (3t × 3a) + (3p + 3i + 3e)

Let's tackle the next part...

(3p + 3i + 3e) = 3 PARTNERS TO CO-MARKET WITH

A tactic that has worked well over the past few years is companies that partnered with other companies in their network to **co-brand a presentation, webinar, video or campaign.** If you are a technology company that sells to legal firms as an example, partnering with a law firm to run a webinar or write a guide on the complexity of cyber insurance and cybersecurity tools, is a really good idea.

It allows you to:

- Create content that you normally would not have an expert to write
- Share to lists of both companies for double the exposure
- Create broader networks on LinkedIn

(3p + 3i + 3e) = 3 COMPANY INFLUENCERS

Although many feel that LinkedIn has become cluttered and noisy, it will still be the best channel for B2B marketing in 2025 and beyond. Marketers, not just sales people, need to be watching networks and understanding who does what on LinkedIn. The top three influencers you can find outside of your company will be valuable resources when a proper "give-to-get" relationship is established using social media.

But let's redefine what we mean by "influencer."

In the B2B world, an influencer isn't someone pushing products to millions of followers, it's **someone who has gone through your entire customer journey: from awareness, to consideration, to conversion and come out the other side as an advocate.** They believe in your solution, your team, and your value. When activated, they become your most trusted marketing asset: a real person with real credibility, sharing their story in their own voice. Platforms like LinkedIn are where those voices carry weight.

THE BOTTOM LINE: People want to buy from people, not companies, and the #1 place they go to learn about someone is LinkedIn.

(3p + 3i + 3e) = 3 EVENTS

Many people lost site of the power of face-to-face marketing during 2020/21, but it is back and stronger than ever. **What are the top three events you can attend to raise your profile in your community?** It might be networking, a conference, or a guest spot on someone else's webinar. Showing your face, connecting with people around their business problems, and sharing thought leadership will never go out of style.

Figure out where you need to be and why and make it a priority in 2025.

Where does Marketing Copilot spend our time?

CONFERENCE TITLE	TYPICAL TIMING	VALUE FOR MICROSOFT PARTNERS AND ISVS	VALUE FOR END USERS
DIRECTIONS NORTH AMERICA	April or May	Strategic roadmap updates, ISV networking, Microsoft Partner announcements, D365 Business Central focus	Not primarily targeted at end-users
COMMUNITY SUMMIT ROADSHOWS	Various, multi-city events throughout the year	Regional exposure, local networking, targeted marketing	Localized training, community connections, access to experts
DYNAMICSCON	May	Speaking opportunities, user-led sessions, grassroots community access	Community-focused learning, real-world case studies, Dynamics product training
AI COMMUNITY CONFERENCE	Various, multi-city events throughout the year	Learn AI strategy, showcase Copilot solutions, partner networking	Understand Copilot capabilities, business use cases, AI readiness
COMMUNITY SUMMIT NORTH AMERICA	October	Networking with end-users, thought leadership, partner booths, lead generation opportunities	Deep product training, user group sessions, peer networking, hands-on learning
DIRECTIONS EMEA	November	EMEA partner engagement, product updates, ISV showcases, community building	Not primarily targeted at end-users

WORKSHEET #2

(3p + 3i + 3e)

1b

Re-Write Your Primary Buyer Persona:

Now, let's think about how you can reach them through Partners, Influencers, and Events

List 3 partners you can co-market with.

3p

1.
2.
3.

List 3 company influencers that can share on LinkedIn:

3i

1.
2.
3.

List 3 events you can speak at in the next 12-months:

3e

1.
2.
3.

WORKSHEET #3

Full Growth Formula Map

3 Partners

3 Influencers

3 Events

1 Primary Buyer Persona

3 Buying Triggers

1

2

3

3 Attributable Touchpoints

Developing a Content Strategy

At this point, you have your formula mapped out — but getting it to ***work*** for your business doesn't end here. Now you need a killer content strategy that speaks to your buyer personas, wherever they are in the buying cycle.

There are only 3 ways to qualify a customer:

1. I love your value proposition and *I want it now*
2. I like your value proposition but *I'm not ready yet*
3. I hate your value proposition and *I'll never buy this*

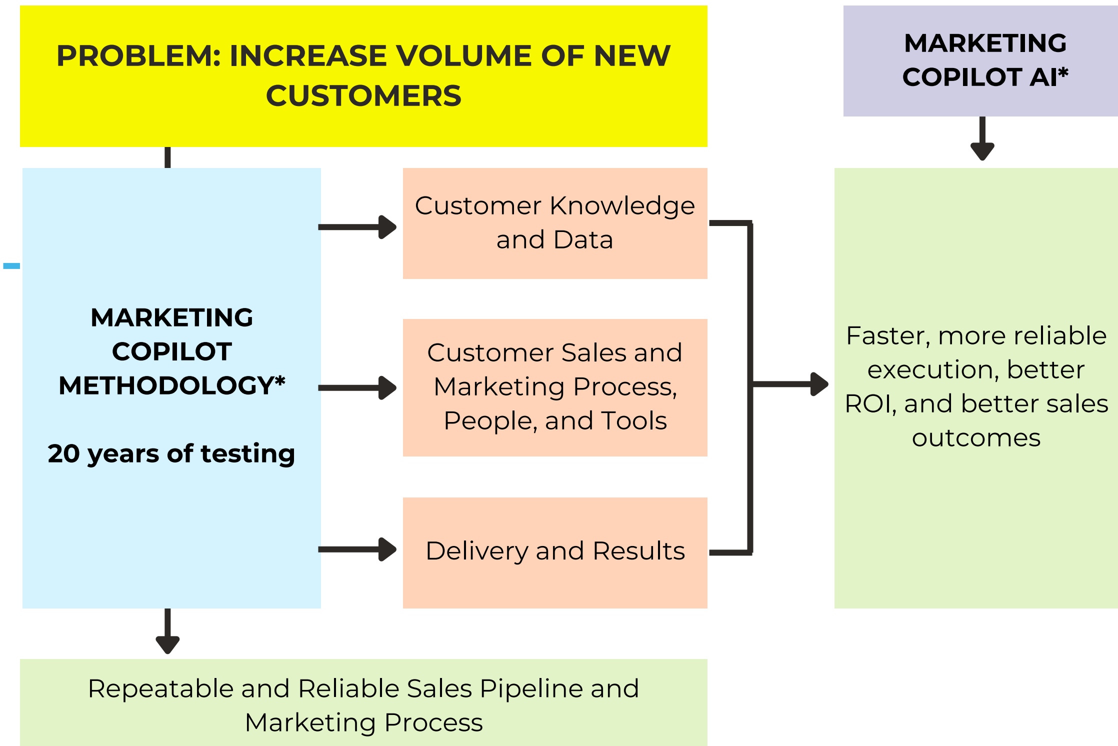
Knowing where your prospects are within these three categories should be the primary goal of your marketing team.

YOU NEED CONTENT TO NURTURE LEADS AT EVERY STAGE

AWARENESS	CONSIDERATION	CONVERSION
Anything happening in the industry that promotes your company name.	Activities getting people to the website that secures an email address or tracking activity of an email address.	Creating active engagement with your company that tracks torards a sales inquiry.
ACTIVITY	**ACTIVITY**	**ACTIVITY**
☐ Whitepaper ☐ Templates ☐ Tip Sheet ☐ Checklist ☐ Educational Videos ☐ Educational Webinar ☐ Blog Posts ☐ Infographics ☐ Podcasts ☐ Newsletter	☐ Customer Case Study ☐ FAQs ☐ Plans/Pricing ☐ Testimonials ☐ Comparison Guides ☐ E-Book ☐ Templates and Tool Kits ☐ Catalogues/Brochures ☐ Quiz ☐ Pillar Page ☐ Lead Magnet	☐ Consultation Offer ☐ Estimate and Quotes ☐ Various Plans ☐ Coupons ☐ Demos ☐ Free Trials ☐ "Book a Call" ☐ Pre-Analysis/Audit ☐ Activity Questionnaires
Rarely Attributable	**Attributable**	

The Bigger Picture

How does the Growth Formula fit into the larger picture of your strategy and solve key business problems? Check out the journey map below that documents how we have leveraged the Growth Formula + Marketing Copilot AI to increase volume of new customers for our clients.



***MARKETING COPILOT METHODOLOGY:**
Value/Unique Differentiation + Buyer Persona + Sales Process + Conversion Strategy = Marketing Qualified Lead (MQL)

Executed through our **Growth Formula**

***MARKETING COPILOT AI:**
More than just a chatbot — it's a dynamic, AI-powered customer-facing experience that lives on your website and drives real conversions.

Built on proven technology marketing strategies and powered by your documented value proposition, buyer personas, and content, it transforms static websites into intelligent lead capture engines.

When mapped to your **Growth Formula**, it becomes the front door to your digital funnel — capturing data, qualifying visitors, and seamlessly integrating with your CRM and marketing systems to accelerate results.

Marketing Copilot® Proprietary Methodology | What you already have in your business | Outcomes

LET'S CONNECT!

The Marketing Copilot® Team gives you access to a group of experts with thousands of hours of experience in B2B technology marketing, particularly within the Microsoft, MSP and HubSpot channels.

Our formula, developed over 15 years with over 200+ technology leaders, is not just pioneering — it's proven. We integrate seamlessly with your team, enhancing your sales and marketing processes and growing your revenue.

Book A Call >

The Company We Keep:

CORPORATE

PARTNERS AND ISVS

MANUFACTURING