SPOTLIGHT

INFLUENCE ORCHESTRATION

The emerging B2B discipline of earning trust from the humans your buyers believe, and the machines that read them

Two Truths

Earned beats owned.

Buyers and machines verify you on your site. They choose you everywhere else.

Influence is a team sport.

Everybody plays. Nobody's the captain. Why not you?

One Lie

"AI changed everything."

It changed how we search. It didn't change who we trust: Humans.

Three Predictions

Already underway

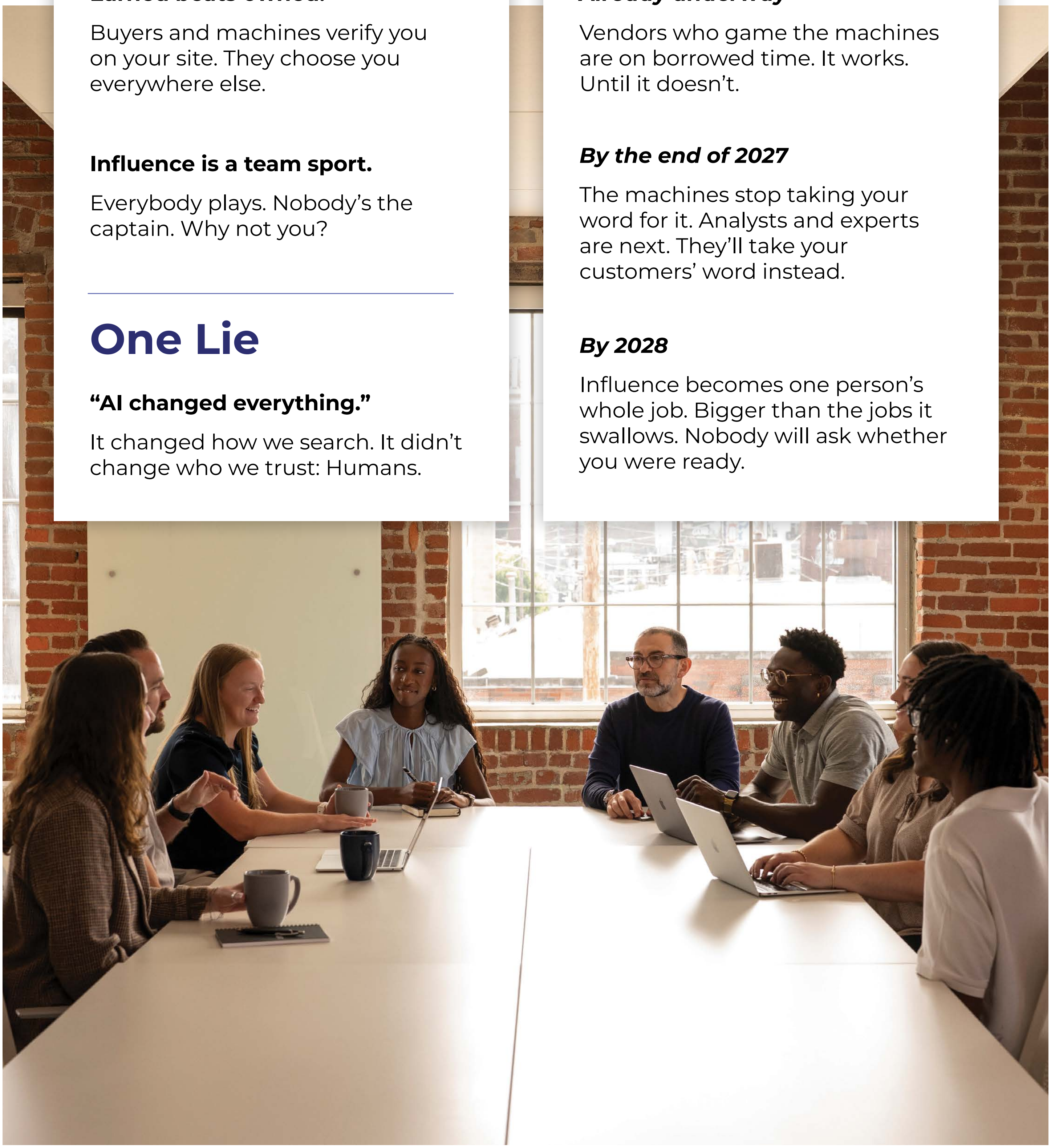
Vendors who game the machines are on borrowed time. It works. Until it doesn't.

By the end of 2027

The machines stop taking your word for it. Analysts and experts are next. They'll take your customers' word instead.

By 2028

Influence becomes one person's whole job. Bigger than the jobs it swallows. Nobody will ask whether you were ready.



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Introduction

Whatever you sell, your market has a cast of characters: Vendors. Buyers. And the people your buyers believe: customers who have already deployed something, experts who publish, influencers with their own audience, and partners who stake their reputation on yours.

The who, what, where, why, and so what of authority varies from market to market. In B2B technology, it’s the analyst firms. Elsewhere, it’s a standards body, a trade journal, or a professor.

That shape was always there, but now machines read it, assemble it, and hand your buyer one answer before you know a deal exists.

Every one of those third-party voices still works. However, we fund them last, measure them least, and split the work across separate teams that each own a piece. Those habits were built for a time when you could publish your way to the front. That era is closing.

So what replaces it? Nobody has the final answer yet, including us.

That’s the opportunity, and it will take more imagination than optimization to seize it.

None of the voices that decide your deals are yours to write, but every one of them is yours to earn.

Executive Summary

You earn influence, or you lose relevance.

Your buyers are already finding somebody else, because no one is vouching for you. Then they stop considering you at all. Then your own executives stop asking what you think. And your job expires. Or it goes to someone who reinvented first.

Reinvention is necessary. It asks you to move money to earned, to put internal teams that don't talk into the same room, and to take consistency seriously across every outside voice.

We set out to answer a question that gets asked in every room and settled in none: What does influence actually mean now? We interviewed 23 leaders who build, measure, and carry B2B influence. We reviewed 27 published studies of the B2B buyer. And we analyzed millions of AI-engine answers and citations across many B2B technology categories. We went looking for the balance between owned and earned, and measured how far owned content carries a vendor. Not to the top. See Chapter 3.

Influence, as we define it: trust, earned, compounding, and resistant to fabrication, that streams in, unseen, from third parties to shape decisions before anyone perceives it at work. Chapter 4 defends every word.

The leaders we interviewed watch their functions change shape, and opportunities fall between chairs because nobody owns the space in between. Almost nowhere is one person doing that work, and within a few years it will be somebody's whole job.

Influence Orchestration is the deliberate coordination and shaping of influence across the B2B buyer journey and digital ecosystem. Customers, analysts, experts, partners: every voice your buyers trust, run as one system, under one name.

Imagine a buyer checking source after source and finding the same answer, the one you earned.

This report invites you to make two moves, or to make the case for them.

1: Flip your owned/earned emphasis.

- **Earn third-party artifacts that name you.** The engines build their answers from what other people independently say about you.
- **Stop trying to out-publish your market.** Vendors who lean mostly on their own content are harder to find, not easier.
- **Sequence earned before paid.** Paid amplifies whatever earned has already built.
- **Make authenticity the standard.** It's what survives the next change to how the engines work, and the one after that.
- **Move the budget to match.** Everything above is theater until you do.

2: Put one name on influence.

- **Distribute the execution.** Keep the accountability in one place.
- **Run the test.** Write down who owns analyst relations, expert content, influencer relations, partner marketing, customer reviews, and communities. Who orchestrates across them? Anyone?
- **Give them budget.** A name without a budget is a scapegoat.

Get this right and you win before the conversation starts. Get there first and you define the job that follows.
Are you ready?

What Does “Influence” Actually Mean?

in·flu·ence *n.*

Origin: late 14th century, from Medieval Latin *influentia* — “a flowing in,” from the Latin verb *influere*.

An astrological term: a power that streams in, unseen, from the stars to shape human character and fate.

Ask five people on your leadership team what influence means. You’ll get five answers. Ask who owns it, and you’ll get a shrug.

That shrug is expensive. What nobody owns, nobody questions. So the money keeps coming, on autopilot, to the one channel that already has a line item: your own content.

Buyers read it, but to confirm decisions, not to make them. Earned is what someone else publishes about you, on their authority rather than yours. It has no dedicated line item. The closest thing is brand.

Everyone in B2B knows buyers decide early. Far fewer understand that the shortlist is written somewhere you can’t see, by people who don’t answer to you: customers, analysts, influencers, partners, and the buyers’ peers. You never know when you lose.

This vagueness has had a long grace period. It ended when machines started assembling the answers your buyers read.

The modern definition of influence, per Merriam-Webster, is “the power or capacity to cause an effect in indirect or intangible ways.” Over time, the definition lost the source, but the source is the whole game.

We asked 23 leaders who build, measure, and carry B2B influence: *What does influence mean to you?*

The broadest answer came from Philip Sheldrake, managing partner at Euler Partners and author of *The Business of Influence*.

“You’ve been influenced when you think something you wouldn’t otherwise have thought, or when you do something you wouldn’t otherwise have done,” he says. Humans, after all, evolved as social creatures. “It’s not like influencing and being influenced is an option; it’s how we live, how we work, how we cooperate.”

“Trust” came up repeatedly, as a precondition for influence, or the substance of it.

“You can’t have influence without trust,” says Mary Shea, co-founder and chief growth officer of Meerkat. “You can’t have influence without authority. You can’t have influence without expertise.”

Joel Harrison, a B2B marketing thought leader and podcaster, sees a two-way flow. “By generating trust, you are then seeking to influence people,” he says. “If people trust you, you are being influenced by them.”

Relevance and context also matter.

“Influence might get you the meeting, but influence is not what ultimately gets someone to purchase,” says Ashley Faus, head of lifecycle marketing portfolio at Atlassian. “If you fundamentally can’t meet my needs, it doesn’t matter how much I like you or trust you.”

Trust, authority, expertise, fit: none of them reduce to a single, quantified number.

“Influence is a poor proxy for influencing,” Sheldrake says. “When we’re looking for influencers, we’re saying we’d like to understand how influence goes around, comes around.” Reduced to a score, influence loses the context that made it worth having. “The challenge comes when you get a bit lazy and just abdicate to the noun.”

Megan Burns, founder and principal at Experience Enterprises, sees a better approach. “We have to stop thinking about trust as a point that we measure and start thinking about it as a landscape that we map,” she says.

What does “influence” actually mean?

Trust, set in motion. Know what you want it to move.

“You’ve been influenced when you think something you wouldn’t otherwise have thought, or when you do something you wouldn’t otherwise have done … It’s not like influencing and being influenced is an option; it’s how we live, how we work, how we cooperate.”

— PHILIP SHELDRAKE

Where Does Influence Do Its Work?

The answer is uncomfortable: mostly where vendors cannot see it.

To find evidence on buyers themselves, we reviewed 27 published studies of how they behave. The evidence comes from buyers, not from marketers reporting on them.

The winning vendor was already on the buyer's day-one shortlist 95% of the time.[1]

Kerry Cunningham, head of research and thought leadership at 6sense, puts the timing plainly. "By the time you get to the buying process, they're already operating with a lot of preference built," he says. "Your ability to influence them once they're in a buying process is actually diminished quite a bit from how we tend to think about it."

Decisions land on more people than any vendor tracks. 6sense research puts the typical buying group at about 10 members, most of whom never speak to sales.[2] You're targeting a persona. They're sending a committee.

Ask a practitioner where that preference gets built and you get an answer about what stopped working.

"Prospects are not coming to our website first," says Ricarda Rodatus, VP of influence and insights at NetApp. "They're not looking at our social channels. They're not getting a magazine with our advertising. It's also hard to get them to our signature events. The one thing they do is put a prompt into their favorite LLM and get a ranking."

Buyers start[3] in the prompt window; they rarely stop there.[4] Across the studies that measured it, buyers check what a machine tells them against vendor sites and in search engines.[5] What they trust most is each other. Not one buyer who talked to a peer about a purchase said it didn't help.[6]

Jasman Singh, lead AI analyst at Profound, sees

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>
> — **RICARDA RODATUS**

[1] 6sense, 2025 B2B Buyer Experience Report (Nov. 2025; n=4,000 global B2B buyers). Winner came from the Day One shortlist 95% of the time.

[2] Ibid. Typical buying group of about 10 members, most of whom never speak to sales. Confirmed by Cunningham, August 2026.

[3] G2, The Answer Economy: How AI Search Is Rewiring B2B Software Buying (Apr. 2026; survey of 1,076 B2B decision-makers across North America, EMEA, and APAC, fielded March 2026; G2 discloses generative-AI assistance in study design and analysis). 51% begin software research with an AI chatbot more often than with Google, up from 29% in April 2025. g2.com/answereconomy

[4] TrustRadius, 2026 B2B Buying Disconnect (2026; survey of 1,862 verified technology buyers and 444 vendors, fielded January 2026). 94% of buyers fact-check AI-generated information; 72% do so always or very often, up from 58%. explore.hginsights.com/b2b-buying-disconnect-report

[5] Semrush, How AI Tools Shape the B2B Buying Process (July 2026; 519 AI-using respondents of 622 valid U.S. B2B professionals, fielded March–April 2026). When AI mentions a vendor, 71% visit that vendor's website and 63% search Google. semrush.com/blog/how-ai-shapes-b2b-buying — And: NRG and Google, Understanding the Empowered Buyer (Oct. 2025; n=1,861 AI users within a total sample of 2,063 U.S. senior decision-makers). 63% validate AI output via Google Search, 45% via vendor websites. nrgmr.com

[6] TrustRadius, 2026 B2B Buying Disconnect. Peer conversations and third-party reviews ranked highest in buyer trust while vendor marketing collateral ranked last; 53% of buyers spoke to a peer during the buying process, and every one rated the conversation at least somewhat helpful.

it from inside the machines: creating an answer about a vendor sets off validation checks across review platforms and community threads. Machine or human, the move is identical: weigh what a vendor claims against what others say independently.

What about analysts? They haven't lost authority, but their place in the buyer journey is different.

"It's more of the discovery, 'Oh, I forgot this vendor,' or at the very end: 'Did I forget anybody?'" says Anjali Yakkundi, SVP of marketing at Movable Ink, who spent years on the other side of the relationship as a Forrester analyst.

The data echoes her point:

- Buyers who check AI outputs against analyst reports: 43%[7]
- Buyers who say market research firms shape their shortlist: 36%[8]

The shape of the journey is steady: a path run on other people's words, with machines now assembling those words into answers.

Where does influence do its work?

Out of sight: among peers, in communities, and now in prompt windows. Go where preference forms, not where the meeting happens.

[7] NRG and Google, Understanding the Empowered Buyer. Among buyers who used AI tools, 45% validate AI output against vendor websites and 43% against analyst reports (n=1,861).

[8] G2, The Answer Economy. Market research firms cited by 36% of buyers as a source influencing shortlists, tied with vendor sites and ahead of peers and colleagues (33%); gen AI chatbots (54%) and software review sites (43%) ranked higher. Multi-select question.

What About Owned Content?

Buyers no longer start at your website. They come back to it: between 45% and 71% of them, depending on who asked and how.[9]

The best job for owned content is confirmation. An analyst mention, a peer review, or an AI answer puts you on the list; the buyer then arrives at your website to check what they have heard. They need to find evidence you are credible, clear documentation of what the product does and costs, and case studies that turn a favorable impression into a business case.

"Owned versus earned is about evaluation versus validation," says Bijou Barry, AI principal analyst at G2. "And those do two very different jobs. An evaluation gives me the details of what I'm measuring as a form of trust. A real review gives me context: what I expected it to do, and how it actually performed. One doesn't become more important. But one cannot happen without the other."

The machines make the same visit. Your verification layer has to be tight, current, and consistent. Think of your website as your résumé. The reviews, the analyst notes, and the community threads are your references.

The distinction is not between owned content that matters and owned content that does not. It is between the job owned content does well (verify, specify, confirm) and the job the past two decades assigned it: generating awareness and building trust from scratch. Owned content was never suited to that job. AI answer engines just made the mismatch impossible to ignore.

"AI means everybody is able to produce average content really fast, at a similar level of bland, a similar level of competency," says B2B marketing thought leader and podcaster Joel Harrison.

"What separates competent from good is the authentic voice of somebody you trust, and that's an earned conversation."

[9] Semrush, How AI Tools Shape the B2B Buying Process (July 2026; 519 AI-using respondents of 622 valid U.S. B2B professionals, fielded March–April 2026). When AI mentions a vendor, 71% visit that vendor's website. semrush.com/blog/how-ai-shapes-b2b-buying — And: NRG and Google, Understanding the Empowered Buyer (Oct. 2025; n=1,861 AI users within a total sample of 2,063 U.S. senior decision-makers). 45% validate AI output via vendor websites. nrgmr.com — The spread reflects different questions: Semrush asked what buyers do when AI names a vendor; NRG/Google asked which sources buyers use to validate AI output.

What Do The Machines Actually Reward?

How the engines pick their sources determines whether your buyer ever sees your name. It is also a moving target, so don't give yourself a migraine trying to absorb every change to the engines' preferences. Read the data closely and keep authentic content your focus. That's the part that holds while the rest moves.

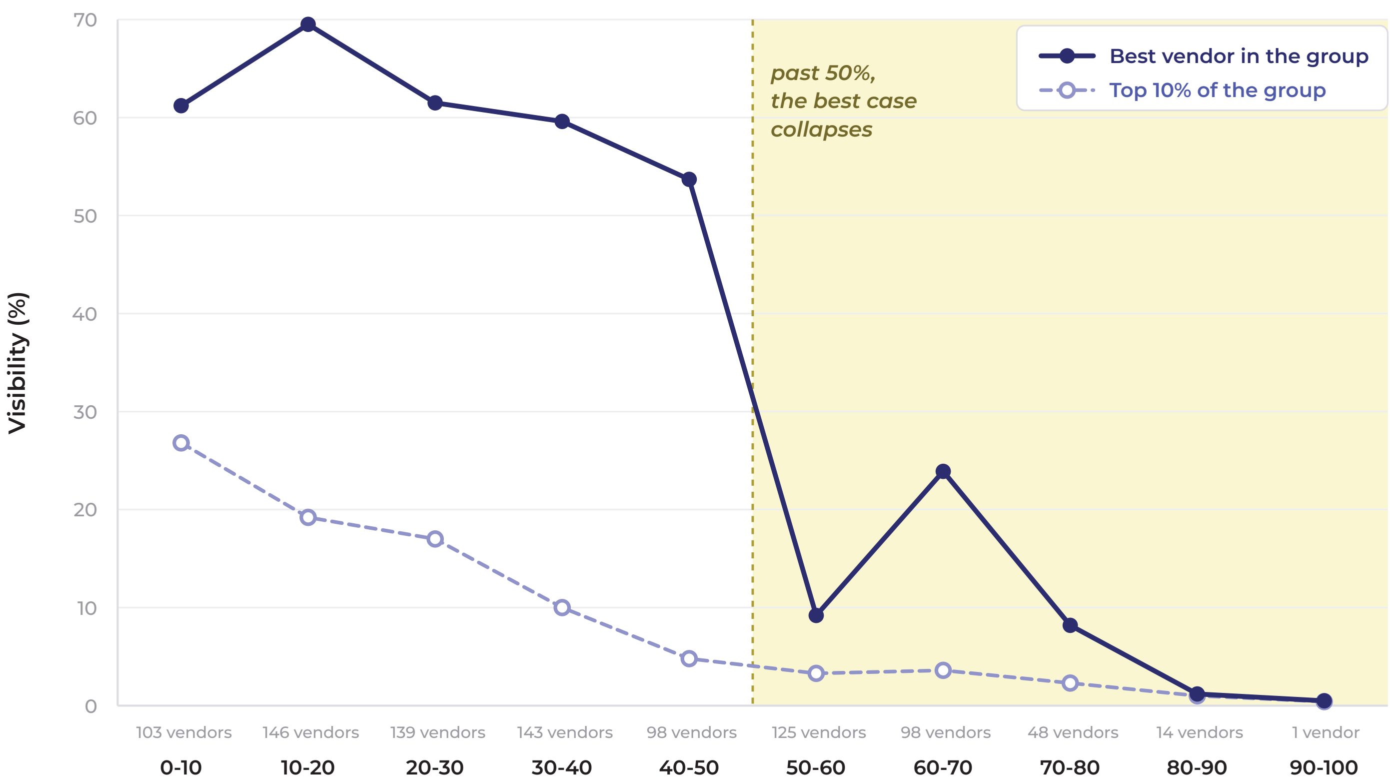
"All the stuff that's good for the robots is because it's good for the humans," Faus says. "Humans also like structured information. Humans also like skimmability. The robots are optimizing for the humans — most people have it exactly backwards."

3.1: Owned content isn't enough for your influence to shine[10]

When an answer engine recommends a vendor, something supplies the evidence. Sometimes, it's the vendor's own website — owned content. Sometimes, it's content from third parties — earned. Both are effective; both are important. But what ratio of owned and earned do the most-visible vendors have? Is there a tipping point where earned acts as jet fuel?

[10] Six AI platforms, commercial prompts only, July 2025 through June 2026. These results are reported in aggregate because tracking coverage came online in stages across the period. Owned content backing is the percentage of a vendor's mentions that cite its own content.

Figure 3.1 – With over 50% reliance on owned content, maximum visibility plummets



915 vendors across 10 B2B categories, six AI assistants, vendor-shopping questions only. Below 50%, some vendors still reach 50-70% visibility. At and above 50%, the best anyone manages falls to the floor.

We measured the balance for 915 B2B technology vendors across 10 technology categories, then sorted them into two camps. Left Camp: vendors whose owned content makes up less than 50% of what backs them. Right Camp: vendors whose owned content is more than 50% of it. For each group, we examined the best result any one vendor can achieve (dark blue) and the top 10% of vendors (light blue).

Notice how visibility looks great for the groups on the left, and quite different for the groups on the right.

What this shows:

- Owned content isn't enough on its own. The best visibility needs earned mentions.
- It stays effective, but radically less so once it's the majority of your voice.

3.2: The most-visible vendors are backed by analysts and customers[11]

We took the same 915 vendors and sorted them by category visibility. Then we compared the vendors at the two ends: the least-visible fifth against the most-visible fifth. For each group, we asked how often an AI answer about the vendors carries an outside voice, either quoted in the response or cited as a source. Among outside voices, we isolated analyst firms and customer review platforms.

What this shows:

- The most-visible vendors benefit from the earned mentions of their customers and the analysts who cover their category.
- These are the pools of trust that need long-term investment and cultivation. Without them, your visibility is at risk.

[11] Ibid. Citations were mapped to each source's listed domains.

Figure 3.2 – The most visible vendors carry more analyst and customer backing

Analyst backing roughly doubles from the least visible vendors to the most visible. Customer evidence is the larger channel at both ends.

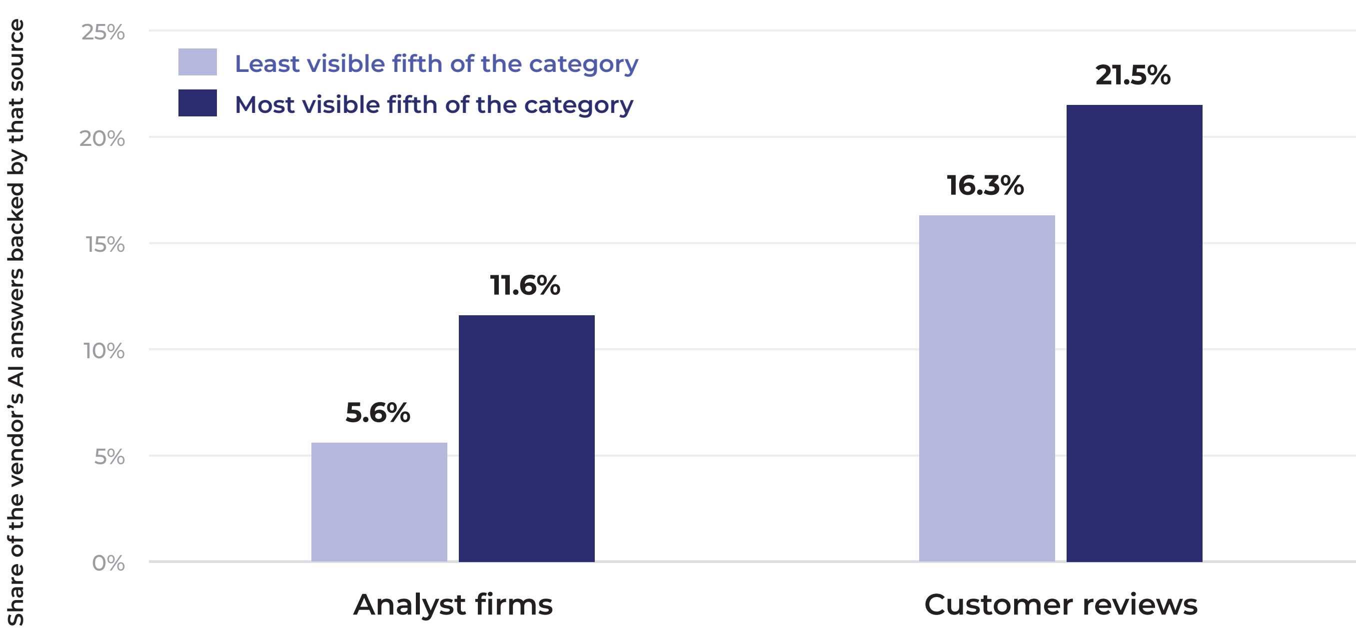
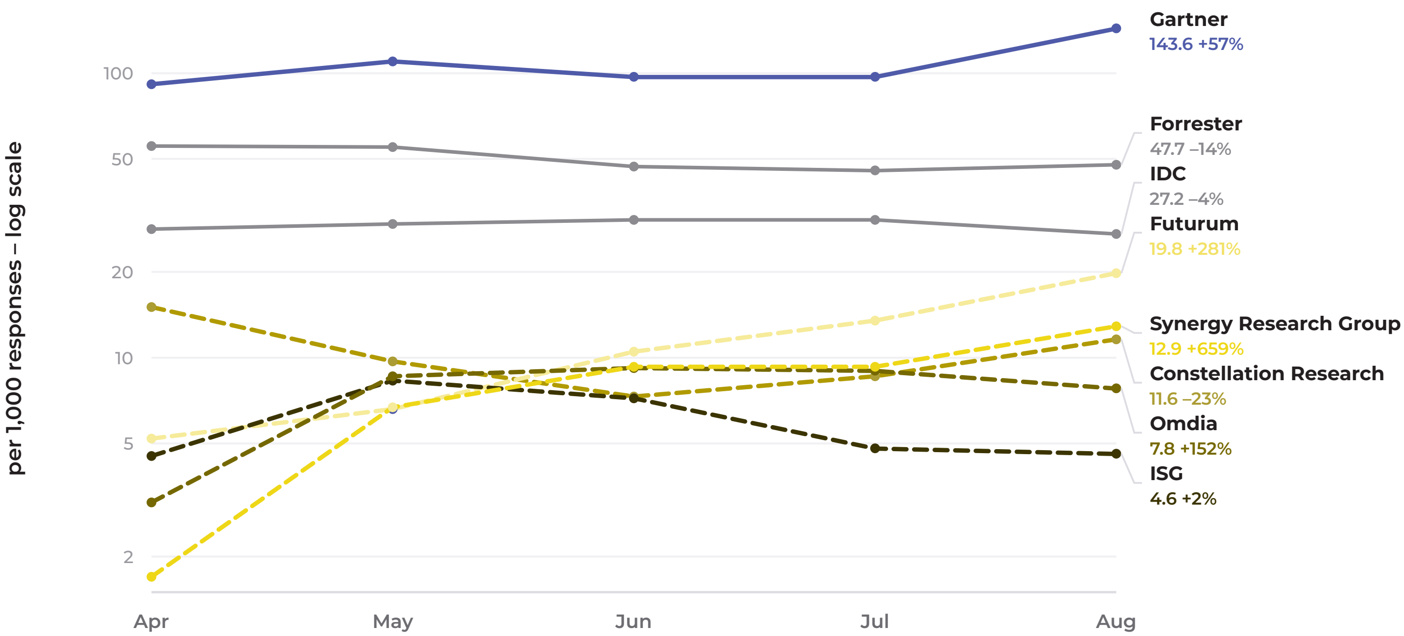


Figure 3.3 – Analyst firm presence in AI answers, April to August 2026

Share of AI answers naming or citing each firm, per 1,000 responses. 68,299 answers, 6 platforms, 10 topics.



Log scale: each gridline is a multiple of the one below it, so a steeper line means faster proportional change, not a larger absolute one. Gartner Peer Insights excluded throughout.

3.3: The varying (and stable) visibility of research firms[12]

We analyzed 68,299 AI answers across six answer engines for a variety of topics within the general scope of the digital workplace category, then counted how often research firms were named in the answers or cited as sources. Thirty-one research firms surfaced, with eight of them carrying the lion's share of that presence.

These firms don't cover digital workplace equally. Some run dedicated practices with numerous analysts; others focus on it but with fewer resources; some reach the category through broader coverage. Read the movement below with that in mind.

In digital workplace, Gartner dominates. It finishes at 143.6 per 1,000 responses, up 57% from the start of the window. Gartner's presence is three times Forrester's and nearly equal to the rest of the field combined.

Forrester and IDC were steady by comparison. At -14% and -4% over the window, both moved far less than the firms below them.

Everything below them is small and in motion. Over five months, one firm gained 659%, another 281%, another 152%, all from bases under six per 1,000 responses. One fell 23%. The order inside that group changed during the window.

Before you act on any of this. One well-structured comparison page can, legitimately, carry a firm into answers about a topic it covers lightly. But that doesn't mean that page, or their coverage of the topic, will maintain their visibility as time passes. Check what the engines are lifting from a source before you invest in the relationship behind it. And read all of it as a snapshot of a moving system rather than a verdict on any firm. The engines are still learning what to trust; the firms are still learning what to publish. Everyone here is early.

Activate your wins — the case from Google

The best-performing pages for Google (the pages about its digital workplace offerings, not its search results pages) are analyst-validation pages. Of every citation to a Google URL, 17.5% goes to a page about what an analyst said. A single press release about a Magic Quadrant placement pulled 641 citations, outperforming nearly everything else Google publishes.

Any win with an analyst firm should be considered for activation. When the research itself sits behind a paywall, your own announcement of the result may be the only version the engines can reach.

The numbers above are specific to digital workplace. The mechanics below are not.

Questions for the research firms

Every category has its own list. Run this analysis in yours, then start the conversation. Two patterns show up regardless of which firms surface, and they call for different questions.

- **Named but not cited.** The engines say the firm's name without retrieving anything the firm published. Ask how much of their content is indexed and reachable today, and what changes over the next year. A firm in this position lends authority to an answer without contributing evidence to it.
- **Cited but not named.** The engines lift the firm's pages without attaching the firm's name. Ask if there is a plan to fix that.

3.4: A field guide to the review houses[13]

Customer evidence is one of the largest sources of authentic voice in AI answers. Here is what we saw when we examined how the answer engines used five software review platforms. It's one sample, not a rule — a place to start your own check.

An answer gets built in two moves

First, the answer engine assembles a shortlist. Then it writes the justification.

Those are separate jobs, and in our sample the platforms weren't interchangeable. G2 and Gartner Peer Insights did the shortlisting. TrustRadius and PeerSpot supplied the reasoning. Capterra tended to corroborate what the other two had already said.

Where we'd start

- *Invisible in LLMs?* Look first at your review volume and rating quality on G2 and Gartner Peer Insights.
- *Described incorrectly in answers?* Look at whether your TrustRadius and PeerSpot reviews are detailed and quotable.

Those are decisions you could make this quarter.

What the four findings add up to

Stand back from all of it. The pattern is not that any one channel wins. It is that the four findings move independently, and the answer about your company gets built from all four. Owned alone is a ceiling. Analysts and customers lift it. The firms reorder in months, not years. The review houses each do a different job. Four mechanics, four speeds. Machines synthesize them, and your buyer reads the result as one voice.

Nobody answers for that voice.

> What do the machines actually reward?
>
> ***They trust third-party artifacts that name you far more than your owned content.***

What It Is	How AI Used It	Where We'd Focus
G2: More than 3.6 million reviews, with Grid Reports ranking products by satisfaction and market presence. One of the inputs to Futurum's Signal evaluations.	**Volume validation.** Precise star ratings plus ease-of-use pros and cons, quoted at high review counts ("4.8/5 across 14,000 reviews"). Cited most often, and most precisely.	Drive review volume and recency; win ease-of-use and satisfaction Grid categories. The review count itself is leverage, because AI cites the scale.
Gartner Peer Insights: Willingness to recommend percentages, "Customers' Choice," and structured sub-scores for integration, deployment, and support. One of the inputs Gartner analysts use in MQ evaluations.	**Credentialing & shortlisting.** Vendors with thin review counts didn't surface.	Clear the review-count threshold, since thin counts leave niche vendors invisible; push for "Customers' Choice" and high willingness to recommend.
Capterra (now owned by G2): Skews toward small business and ease of use.	**SMB corroborator.** Almost always co-cited to reinforce G2 or Gartner, and rarely drove the narrative alone.	Maintain presence and rating for corroboration, especially with SMB buyers, but do not over-invest in it as a standalone driver.
PeerSpot: Strong in enterprise, security, and IT. Prioritizes quality over quantity.	**Numbers & mindshare.** Supplied mindshare percentages and willingness to recommend figures available from no other source in the set.	For enterprise and technical products, build presence and mindshare; encourage richer, more detailed reviews since it is aggregate-heavy and depth helps. Be here if AWS or Google marketplaces matter to you.
TrustRadius: Balanced pros and cons synthesis plus verbatim reviewer quotes.	**The justification source.** AI lifted reviewer quotes directly into its reasoning.	Cultivate detailed, quotable, use-case-rich reviews. This is where AI gets the language to explain why you fit.

[12] 68,299 responses and 638,267 citations from the digital workplace category, six AI platforms, April through August 2026. Citations were mapped to each firm's listed domains. We excluded Gartner Peer Insights, which is a peer review platform rather than a source of independent analyst research. Rankings are specific to this category. The chart plots mentions and citations combined, per 1,000 AI responses. Color groups the firms three ways: Gartner, then Forrester and IDC, then the rest of the field. The vertical axis is log scaled, so a steeper line means faster proportional change, not a larger absolute one.

[13] Approximately 600 commercial prompts across eight AI engines, drawn from the Profound B2B buyer set. The data covers May 2026 through July 2026. Platform-by-category weighting uses the full citation population. The per-platform usage signatures come from a qualitative analysis of approximately 120 to 150 sampled answer snippets per platform, each classified for attribute focus, role, and polarity.

What About Traditional Search?

Answer engines aren't replacing traditional search yet. Between August 2024 and February 2026, U.S. time spent searching Google grew from 90 billion to 93 billion minutes a month, while time on ChatGPT, Gemini, Perplexity, and Claude grew from 2 billion to 10 billion a month.[14] And 76% of weekly AI users still search Google every day.[15]

"More and more people use AI every single day, and almost all of them use it to search for information," says Nate Elliott, principal analyst at EMARKETER. "But on average people still spend about 10 times as many minutes per month searching Google as they do searching on AI chatbots, and the amount of time people spend with Google continues to grow."

The boundary is also blurring: many "AI" surfaces are actually Google evolutions like AI Overviews, AI Mode, and Gemini.

None of this is either/or. Buyers often use both during a single purchase; 60% of product researchers do their own research after an AI recommendation.[16]

For both worlds, the foundation is authoritative content and credible validation from voices you don't control. But AEO plays by rules SEO never had. That contributes to the case for a strategy — Influence Orchestration — rather than a stack of channel projects.

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[14] Comscore Media Metrix Multi-Platform, March 16, 2026, as presented in Nate Elliott (EMARKETER), AI Has Changed Everything (Except What Your Customers Want), Spotlight on the Road: NYC, May 2026. US minutes spent with top search platforms, in billions, August 2024–February 2026. Universe: desktop ages 2+ and mobile ages 18+. Confirmed as EMARKETER's most current data on this measure by Elliott, August 2026.

[15] EMARKETER, AI in the Consumer Journey, H1 2026 (April 2026). Daily Google Search users as a percentage of US weekly AI users, April 2026. Weekly AI users n=199; total US internet users n=422. Preliminary data. As presented in Elliott, AI Has Changed Everything (see note on Comscore Media Metrix, above).

[16] Publicis Commerce and EMARKETER, LLM Usage and Trust in the Shopping Journey, March 2026. Percentage of US AI-assisted product researchers, January 2026, responding to "If an AI chatbot recommends a specific product to you, what do you typically do next?" n=1,179 US adults 18+ who used an AI assistant or chatbot to research a product in the past month; respondents selected all that apply. Consumer research, directionally relevant to B2B.

So What Is Influence Now?

in·flu·ence *n.*

A new, working definition: *Influence is trust — earned, compounding, and resistant to fabrication — that streams in, unseen, from third parties to shape decisions before anyone perceives it at work.*

In this definition, every word rests on evidence from our interviews and the machine analysis. It names the kind of influence worth building. It will still be true when the engines change.

Trust
Influence begins with trust, and crumbles without it. That is why the definition doesn't cite attention, reach, or share of voice. Those measure whether you were seen, not whether you were believed.

"The onslaught of content we have available to us has fractured things so much that now any human is trying to figure out who they can trust," says Katie Nafius, director of analyst relations at Visa. "Whether it's a TikTok influencer or a reporter or an analyst, buyers are trying to grasp onto humanity, that sense of who you can trust. Because that's what influence really is."

Earned
Trust can't be manufactured, only earned — and "earned" is a word marketers use loosely.

"Earned does not mean paid," says Russell Rothstein, founder and CEO of PeerSpot. "A happy customer willing to go on the record? That's what you earn."

An emphasis on earned does not have to villainize paid media.

"You need to build your presence on LinkedIn from an organic perspective first," says Davang Shah, VP of marketing at LinkedIn. "It's not about paid media at the outset. Paid media is an amplifier."

Compounding
A paid placement dies the day you stop paying. A customer's public account of your win has a long life.

Freshness matters: half of what answer engines cite is less than 13 weeks old.[17] But "old" authority doesn't dim by default. The old principal still earns, new deposits grow the base, and the account never resets to zero.

"I don't want to win the answer today. I want to win the answer tomorrow," says Bijou Barry, AI principal analyst at G2. "What might people be searching for where I show up in that answer a year from now, two years from now, three years from now? It's completely changing the discoverability problem."

Resistant to fabrication

Conferred trust gets counterfeited, and counterfeits fail in public for their lack of corroboration by analysts and customers. Earned trust has it. But perfection, too, can seem fake.

"The most influential reviews are not five-star reviews, they're four-star reviews," Rothstein says. "That's not specific to PeerSpot."

Not every counterfeit requires lying — consider voices with money at stake.

"You can always trust them not to say the things that would hurt them... It's what they omit that's the problem," says Magnus Revang, chief product officer at Openstream.AI.

A real account carries the rough edges.

Effort is becoming a signal in itself. People can tell the difference, and so can the machines they ask.

From third parties

Trust pools in different places, and each pool has its own characteristics.

For Revang, a nine-year Gartner analyst before he moved to the vendor side, nothing beats the power of customer voices.

"I would trade 10 expert blog posts and a series of successful analyst briefings for one CIO, talking publicly about what we've built together," he says. "That is the most valuable commodity in today's chaotic market."

Build your advocacy program to pursue the specifics you want answer engines to quote back.

Then there is the pool you cannot program: Buyers talk to each other. What you can shape is what a peer could repeat, which is what every other pool on this list is for.

Analysts remain among the most machine-amplified sources because the engines borrow their vocabulary, from category names to artifacts that name vendors. The firm behind an analyst multiplies their credibility and also bounds it — they speak within a methodology, a rating system, and established rules. An influencer or independent expert has neither the multiplier nor the bounds. Amplification and independence trade against each other, and which one serves you depends on what you're trying to prove.

Partners confer trust by staking their own hard-won reputations on yours. EXL was named partner of the year twice in two years, by Genesys[18] and then by NVIDIA.[19]

"To the point of influence, it's credibility for us in a huge way," says Shirley Macbeth, CMO of EXL.

Before anyone perceives it at work

The definition ends where the buying process now begins. By the time you know a deal exists, preference is already formed. Your pipeline metrics measure the aftermath, not the cause. Influence has always done its best work before

> *"The onslaught of content we have available to us has fractured things so much that now any human is trying to figure out who they can trust ... Whether it's a TikTok influencer or a reporter or an analyst, buyers are trying to grasp onto humanity, that sense of who you can trust. Because that's what influence really is."*
>
> — Katie Nafius

anyone noticed. What's new is how much of it a machine now does. You will never see the conversation that decided your inclusion, or exclusion.

This definition is an instrument, not an argument

The purpose is practical: to give investment and ownership decisions a shared vocabulary. If your role emphasizes different components than someone else's, that isn't a misreading; it's the instrument being used. The same word means different things, depending on where the person defining it sits.

We were in the room for one version of this. One team argued influence was internal, translating outside signals into executive decisions. The team next to them argued it was external, the orchestrating of voices in the market. Both were describing their own chairs. The dispute was not resolved philosophically. They found harmony by putting the buyer at the center.

> *"I would trade 10 expert blog posts and a series of successful analyst briefings for one CIO, talking publicly about what we've built together."*
>
> **— MAGNUS REVANG**

So what is influence now?

Something you can build. Cultivate the sources you can't author.

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[17] Profound, Introducing Citation Decay in Profound (Aug. 13, 2026). tryprofound.com/blog/citation-decay

[18] EXL, EXL Recognized as 2025 Genesys New Partner of the Year, April 27, 2026. exlservice.com/about/newsroom/exl-recognized-2025-genesys-new-partner-the-year

[19] Dylan Martin, NVIDIA Exec: These Top Partners Are Aiding Enterprises "Still Struggling" With AI, CRN, March 17, 2026. Listed as "NPN Advanced Technology Partner of the Year: EXL Service" among the 2026 Americas NVIDIA Partner Network Awards, announced at GTC 2026. crn.com

CHAPTER 5

How Do You Run Influence As One System?

The answer is Influence Orchestration, which is the deliberate coordination and shaping of influence across the B2B buyer journey and digital ecosystem.

It has two continuous motions:

- **Track how influence flows through human and AI touchpoints**
- **Feed those human sources with useful, authentic information**

When the voices your buyers trust — be they peers, influencers, analysts, or something else — have harmony about your value and credentials, that's a strong signal to the machines that you are a reliable part of the answers they assemble for humans.

The field is early; the direction isn't in doubt.

For more than a decade, we've seen fuzzy lines between analysts, independent experts, and influencers — and thus the same for the disciplines that manage them. Analyst relations and customer engagement teams were occasional collaborators given analysts' high regard for evidence from vendors' customers, especially as references for the Magic Quadrant and other evaluation reports. Gartner adrenalized that relationship in April 2021, when it ended vendor-supplied references for the MQ process and encouraged its analysts to use Gartner Peer Insights for customer perspectives.[20] ChatGPT landed in November 2022. Less than four years later, generative AI is buyers' most important research tool.[21]

One system has been attempted before, at a smaller scale. Enterprises once built centralized, global influencer relations teams and lost them, because the work was treated as campaign execution rather than a strategic relationship discipline. There are fewer dedicated teams today than there were five years ago, and yet more need for them.

Authentic voices only carry when they're consistent and discoverable. Producing that is the orchestration work, and it's changing how these functions are built from the inside.

"If someone came to me today and said, 'start a new AR practice,' the first thing I would do is not call it AR," says Tanya Shuckhart, head of analyst relations for measurement, analytics, and data science at Amazon Ads. "The function is morphing into influence orchestration: coordinating how external voices shape internal decisions and how internal strategy shapes external perception. AR sits in the middle of the change happening across these disciplines."

Trusted voices converging on one consistent story is what accelerates consensus.

How do you run influence as one system?

Two motions, one owner. Track every channel your buyers trust; feed the people behind all of them.

[20] Gartner's April 28, 2021 change to the Magic Quadrant and Critical Capabilities customer input process, ending vendor-supplied customer references. Gartner's announcement is no longer available at its original URL. Reported contemporaneously in John Rockhold, Gartner Cancels Customer References From Magic Quadrants, Spotlight, May 3, 2021. Gartner encourages but does not require its analysts to use Peer Insights in MQ and Critical Capabilities evaluations. spotlight-io.com/insight/gartner-cancels-customer-references-from-magic-quadrants

[21] John Buten et al., 2026 Buyer Insights: Buyer Usage Of GenAI, Forrester, December 8, 2025 (RES186873); client access or purchase required. Summarized publicly in John Buten, B2B Buyers Make Zero-Click Number One, Forrester, January 22, 2026. forrester.com

Who Owns Influence?

There was an important job to be done, and Everybody was sure that Somebody would do it. Anybody could have done it, but Nobody did. In the end, Everybody blamed Somebody when Nobody did what Anybody could have.

— Adapted from "A Poem About Responsibility," by Charles Osgood

We found no consensus on who should own influence or where it should sit, only that someone has to. The answers fell into three camps:

- **The CMO:** Because influence already lives in marketing.
- **The Chief Communications Officer:** Because communications knows how to earn attention, rather than buy it.
- **The Chief Influence Officer:** Because the new reality requires a new kind of leader.

Our interviewees' answers often reflect their own background or discipline. For many, the answer defaults to marketing. Macbeth, who ran marketing at Forrester before EXL, feels no gap there. Jon Miller, co-founder and CEO of the B2B CMO Project, says influence belongs with the keepers of the brand. Faus says influence deliverables already have a home in marketing. "To add a separate function compounds the problem," she says.

But there are compelling reasons to look outside marketing:

- **The CMO's changing scope:** A marketing executive sits on the executive team or reports to the CEO at just 52% of Fortune 500 companies, down from 58%, the third consecutive annual decline. The title is thinning too: only 36% of the Fortune 500 use CMO, down from 49% a year ago, though Forrester reads much of that as rebranding to chief growth officer or chief commercial officer.[22]
- **The AI gap:** 70% of CMOs cite becoming an AI leader as a critical goal for 2026. Only 30% report mature or fully developed AI readiness.[23] Their CEOs are less generous still: just 15% consider their marketing leaders AI-savvy. Gartner predicts that by 2027, a lack of AI literacy will be among the top three reasons large enterprise CMOs are replaced.[24]

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[22] Ian Bruce, New Analysis Suggests The CMO's Role In The Fortune 500 Is At A Crossroads, Forrester, July 7, 2026. Third annual analysis. 36% of Fortune 500 companies use the chief marketing officer title, down from 49% a year earlier; a marketing executive sits on the executive team and/or reports to the CEO at 52%, down from 58% in 2025 and declining for the third consecutive year. The Fortune 500 ranks companies by revenue across all sectors and includes business-to-business, business-to-consumer, and hybrid firms; Forrester's analysis covers the full list and does not segment by business model. forrester.com/blogs/new-analysis-suggests-the-cmo-role-in-the-fortune-500-is-at-a-crossroads

[23] Gartner, 2026 CMO Spend Survey, press release May 11, 2026. Survey of 401 CMOs and other marketing leaders in North America, the UK, and Europe, fielded January–March 2026; most respondents report annual revenue over $1 billion. 70% say becoming an AI leader is a critical goal for 2026; 30% report mature or fully developed AI readiness capabilities. gartner.com/en/newsroom/press-releases/2026-05-11-gartner-2026-cmo-spend-survey

[24] Peter Adams, Gartner: CMOs Want AI Transformation, but Few Are Upgrading Their Skills, Marketing Dive, February 23, 2026, reporting

- **Competing priorities:** CMOs are expected to be architects of enterprise-wide growth, yet only 28% of B2B marketers say their company can link brand investment to pipeline generated.[25]

Credibility now relies on earning trust across customers, analysts, influencers, partners, and the buyer's peers. This necessitates collaboration across traditionally separate disciplines: customer engagement, analyst relations, and influencer relations. Almost no one we interviewed has lived in all of these disciplines.

"It's everybody, and therefore nobody," Nafius says. "That's what I'm grappling with right now. People agree on the need for aligned and orchestrated influence, but we still operate in silos."

Nothing evolves when silos hold. Sarah Aird-Mash, CMO of FutureGroup, has seen it happen.

"I spoke to a CMO, had a really in-depth conversation, identified a massive opportunity on GEO that they're not pursuing," she says. "She went to her PR team and they said they had it covered. Seven months later, nothing has changed."

The communications case rests on scope. A chief communications officer already owns the corporate narrative across every stakeholder, not just buyers. And communications understands earned attention in a way marketing never had to, because marketing had the budget to avoid it.

The case for a dedicated chief influence officer isn't new. Sheldrake presented the term in 2009, two years before *The Business of Influence* made the case at length.[26] Today, he says influence extends far beyond marketing — covering recruitment, investor relations, and regulatory affairs.

Does generative AI strengthen the case? "Of course it does. Definitely," he says.

The mission of the chief influence officer is to make the entire organization competent at influence. The title is one question. Staffing is another.

"We're going to quickly outgrow having this be a VP's part-time job," says Yakkundi. "At some point, we will need to hire for this role. It's a dedicated, senior person — probably from an analyst relations background, but thinking about it through a new lens, across all these different kinds of influencers."

Rodatus is the only leader in this study with influence in her title. "Influence is something everybody needs to live," she says, and her team carries it: customer and partner relations, community activation, the analyst team. Asked whether that makes her the dedicated leader: "Every day, it's my job."

Whoever takes the job arrives with a head start, but won't be a perfect fit. The ideal direction will depend on your company's structure and where its influence currently flows.

Greg Kihlstrom, principal at The Agile Brand, expects the lines between marketing, revenue, and customer success to collapse as AI agents absorb execution work. "We think of the current structure as permanent," he says. "It isn't."

Who owns influence?

Today, everybody in general but nobody in particular. Put one name on it.

Gartner research shared exclusively with the publication. No base is given for the CEO-perception figure; the accompanying survey of marketing leaders covered 402 respondents in North America and Europe, fielded August–October 2025. The 2027 replacement forecast is Gartner's prediction, not a survey finding. marketingdive.com

[25] Benchmarkit, 2026 Brand vs Demand Benchmarks (January 2026), n=168 B2B technology companies, fielded September–October 2025. Cited in The B2B CMO Imperative, B2B CMO Project, 2026.

[26] Philip Sheldrake, The Business of Influence: Reframing Marketing and PR for the Digital Age (Wiley, 2011). Sheldrake first presented the chief influence officer concept at a workshop in New York in 2009, two years before the book; confirmed in interview with the author.

B2B software company
(name disclosed under NDA)

~2,400 Employees

Marketing Department | Reports to: CMO

$250,000–$320,000 base,
plus annual bonus and equity

Posted January 2028

VP, Influence

Save Apply

Orchestrate influence across the customers, analysts, influencers, and partners our buyers trust, and the machines that read them.

About the Role

Our credibility lives with third parties. Our buyers ask them; so do the machines. While teams feeding these sources do good work, no one currently answers for the whole. This role does.

This is a marketing role with a general manager's edge, owning a system rather than a channel. You will partner with a variety of departments to scale a new, high-trajectory function.

What You'll Do

- **Orchestrate the ecosystem:** Align analyst relations, influencer relations, customer advocacy, and partner marketing. Close ownership gaps between review platforms and community work.
- **Shift emphasis:** Prioritize earned reputation over owned content. Use offsite activation as a multiplier for home-base credibility.
- **Earn compounding signals:** Secure customer reviews and expert recognition. Turn internal experts into credible community voices.
- **Tie influence to preference:** Model how preference forms within buying groups before sales contact. Report on AI visibility to the executive team.
- **Set the standard:** Navigate the mechanics of SEO, AEO, and GEO. Separate durable strategies from monthly hype to keep the organization focused.

Requirements

- **12+ years of experience** in B2B marketing, with 5+ years leading teams and owning budgets.
- **Experience running at least two converging disciplines:** AR, influencer relations, customer advocacy, or partner marketing.
- **Proven ability** to brief the C-suite and secure decisions.
- **Working knowledge** of SEO, AEO, GEO, and AI-visibility platforms.

Desired Skills & Experience

- **Storytelling & Fluency:** Turn disparate signals into actionable executive narratives while remaining fluent in both technical dashboards and human relationships.
- **Adaptability:** Fearless hustle in a young playbook; able to hire for and define excellence across converging B2B fields.
- **Craftsmanship:** An eye for authentic content that compounds versus machine-made noise.

Making Influence Matter In Your Organization

Flip the owned/earned balance

You already agree that earned outweighs owned. Agreement is not the problem. Earned has no line item of its own; the closest thing is brand. Marketing leaders agree too. Look at what they fund.

Miller, who co-founded Marketo, points to evidence from Benchmarkit's 2026 Brand vs Demand study of 168 B2B technology companies. Marketing executives say brand should get 40% of the budget. It gets 25%. They say demand generation should get 50%. It gets 70%. And if budgets get cut, 55% say they would fight to protect demand spending. 11% would fight for brand.[27]

Miller files the pursuit of influence with the keepers of brand, and his study pinpoints why the money hasn't followed the belief.

"The constraint is measurement, not conviction," Miller wrote in his B2B CMO Imperative report. "Brand gets cut first not because CMOs doubt it works, but because demand gen has the dashboards and brand doesn't."

The instruments exist now. The excuse doesn't. And the call to move the money comes from someone who helped build demand gen's house.

"Almost all buyer influence has been assigned to demand gen for the last 15 years or so, and I think that's got to be flipped on its head," Cunningham says. "When it flips, the functions with the most influence are brand, customer, and analyst relations, because those have the longer-term, more impactful effect on preference."

Influence Orchestration is the system to solve all of this, but there's much to discover about how to run it. Lucas Welch, VP for brand and communications at Seismic, raises honest reactions: "What is the orchestration engine? Where do I start? As I gain progress, where do I go next?"

This roadmap will help, on three horizons.

Monday

Audit what backs your AI mentions, and the narratives those mentions tell your buyers, especially the cautions. If the leading source about you is you, you have found your ceiling. Then look at the number per engine. A composite score is honest only if it itemizes on demand, and the engine your buyers actually

> *Almost all buyer influence has been assigned to demand gen for the last 15 years or so, and I think that's got to be flipped on its head ... When it flips, the functions with the most influence are brand, customer, and analyst relations, because those have the longer-term, more impactful effect on preference.*
>
> — KERRY CUNNINGHAM

use is the one whose number matters.

The next three months

Earn third-party artifacts that name your company: analyst reports, experts' articles, customer reviews. The machines cite analyst firms freely, but they quote the artifacts that name names. Better still, earn mentions that support your strengths or counter the cautions you found on Monday. Prioritize by category: analyst signal where firms rate your market, customer evidence and earned coverage where they don't. Sequence earned before paid. Paid is an amplifier. It needs something earned to amplify.

The next 12 months

Build your portfolio of credible, authentic, earned mentions, the insight no volume of machine-made content can manufacture. Then make the flip official: the budget, the emphasis, and one name on the org chart who answers for the whole. Not everybody in general. Somebody in particular.

These moves don't retire after they run. The signals keep working only while someone keeps earning them.

Influence entered our language as a power that streamed in from the stars, unseen, moving people before anyone perceived it at work. Seven centuries later, the direction of flow is unchanged. And the sources have names now: customers, analysts, influencers, partners, the buyer's peers ... and the machines that read them all, millions of times a day. None of those voices are yours to control. Every one of them is yours to earn.

"The machine doesn't invent your reputation," says Singh. "It amplifies the one you've already earned."

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[27] Benchmarkit, Brand vs Demand Benchmarks. 28% of respondents said their company can link brand investments and activity to pipeline generated.

Appendix

Methodology

Expert Interviews

Between June 23 and July 31, 2026, we interviewed 23 leaders about how influence works in B2B: analysts, advisors and authors, and the people who run influence programs inside B2B companies and the platforms that measure them. Every interview was on the record, and every quotation in this report was reviewed and approved by the person who said it.

Machine evidence

The AI response data came from Profound, an AI-visibility platform that captures what answer engines say and what they cite. The analysis of that data is our own. We used a variety of commercial questions about B2B technology markets in major LLM platforms, and the specific platforms vary by vignette. The findings are descriptive, not causal.

Buyer evidence

Buyer perspective here comes from research at scale rather than from a handful of interviews. We reviewed 27 published studies of B2B buying behavior, prioritizing behavior over marketer opinion, large primary samples of buyers and decision-makers, and research published within the past 12 months. Every figure was checked against its source report.

B2B technology categories in Chapter 3 data. Not every analysis covered every category; each footnote states its scope.

AI and machine-learning platforms

AI infrastructure and compute

Conversational AI and contact centers

CPaaS and communications

Digital experience and marketing

Digital experience platforms

Digital workplace

Field service management

Industrial digital and IoT

IT services and consulting

MES and frontline manufacturing

Glossary

AI Search. Search behavior carried out inside an answer engine. The report uses the phrase where a source we cite uses it; “answer engine” is our own umbrella term.

Answer Engine. Any AI system that answers a question directly instead of returning a list of links. Well-known examples include ChatGPT, Claude, Google Gemini, Microsoft Copilot, and Perplexity

Answer Engine Optimization (AEO). The discipline of earning presence in AI answers.

Authenticity. Evidence that traces to a real party with something at stake: a customer who actually deployed the product, an analyst bound by a methodology, an expert whose reputation travels with the claim. Not a question of tone or sincerity, but of origin. Which is what makes it testable, and what makes it hard to counterfeit at scale.

Buying Group. The set of people inside a company who together decide a purchase, typically about 10 members drawn from different functions, most of whom never speak to a salesperson.

Chatbot. A conversational AI interface. Not the report's term; "answer engine" is. It appears only inside material we quote, where the original wording stands.

Chief Influence Officer. An executive role accountable for all of an organization's influence flows, not only the ones aimed at buyers. Philip Sheldrake made the case for it in 2009 and built it into a book two years later.

Customer Engagement. The discipline to build ongoing relationships with customers through meaningful interactions along the customer journey. It refers to the quality of the connection between brands and customers — the relevance of the message and the inspiration it sparks in customers to take action.

Expert. Anyone whose credibility rests on demonstrated knowledge rather than on position or spend. The report uses the word as an umbrella: industry analysts, independent advisors, expert media, and practitioner influencers are all experts. All analysts are experts; many experts are not analysts.

Influence. Trust — earned, compounding, and resistant to fabrication — that streams in, unseen, from third parties to shape decisions before anyone perceives it at work. The report's working definition, drawn from 23 interviews and the machine record.

Influence Orchestration. The deliberate coordination and shaping of influence across the B2B buyer journey and digital ecosystem.

Influencer. A credible expert who shapes how your buyers think, what they trust, and the decisions they make. Unlike an analyst, their influence isn't tied to a firm or formal research methodology, but built through their own expertise, experience, reputation, relevance, and reach. Brands engage them for that expertise and perspective, not to simply amplify a brand message.

Large Language Model (LLM). The model underneath an answer engine. The report says "answer engine" when it means the product a buyer uses, and "LLM" when it means the model itself.

Mention, Citation, Visibility. The three units the machine findings are measured in.

- A **mention** is a vendor named in the text of an AI answer.
- A **citation** is a source the engine links to as backing for that answer.
- **Visibility** is the share of answers that mention a vendor at least once.

Paid, Owned, and Earned Media. How marketing has sorted its channels since Forrester popularized the split in 2009. The report inherits the vocabulary rather than coining it.

- **Paid** is exposure you buy.
- **Owned** is what you publish on your own properties.
- **Earned** is what someone else publishes about you, on their authority rather than yours.

The report's subject is wider than earned media: analyst evaluations, customer reviews, community threads, advocacy, and partner certifications confer trust without being media at all.

Pools of Trust. The sources your buyers believe: customers, analysts, influencers, partners, and the buyer's peers. Not a hierarchy — the pools rise and fall in influence depending on the buyer, the role, and what's at risk.

Search Engine Optimization (SEO). The established discipline of earning position in traditional search results, and the click that follows.

Special Thanks

Anjali Yakkundi
SVP of Marketing, Movable Ink

Ashley Faus
Head of Lifecycle Marketing, Portfolio, Atlassian

Ashley Zeckman
VP, Influencer Relations, Spotlight

Bijou Barry
AI Principal Analyst, G2

Davang Shah
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Jon Miller
Co-founder & CEO, B2B CMO Project

Katie Nafius,
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Kerry Cunningham
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Shirley Macbeth
CMO, EXL

Tanya Shuckhart
Head of Analyst Relations for Measurement, Analytics & Data Science, Amazon Ads

Digital Edition

Spotlight Website

LinkedIn Post

Twitter Post

The version that travels.

- Forward it sideways first
- Run the ownership test. Count the shrugs.
- Send your boss the job description. Or don't. Plot your ascension.

https://spotlight-io.com/pdf/2026-Influence-Orchestration-Report

About Spotlight

Spotlight named the discipline this report describes, and arrived at it the long way. Analyst relations is the founding practice — 14 years and more than 200 enterprise programs — and the work kept expanding into the adjacent pools of trust: customer advocacy, influencer relations, community, and the answer engines that now read all of them.

Headquartered in Kansas City, Missouri, Spotlight has more than 200 consultants, marketers and operations professionals serving B2B technology and services companies. Its practitioners hold more Profound certifications than any firm in the world, and it partners with Profound and G2 — two of the platforms that measure the signals described in these pages.

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Influence Orchestration: The emerging B2B discipline of earning trust from the humans your buyers believe, and the machines that read them

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