

PRE-CALL INTELLIGENCE • PERSONA 02

CMO. *B2B SaaS.*

A pre-call cheat sheet for the enterprise tech seller calling on a *Series B-D B2B SaaS* company.

ROLE Chief Marketing Officer

VERTICAL B2B SaaS

ARR \$25M-\$120M

STAGE Series B-D

BIA is a pre-call intelligence platform for enterprise tech sellers.

Synthesized from 400+ data inputs so you don't wing the first call. Unlike call recording tools, BIA works *before* you dial.

What's keeping her *up at night*.

Four board-level pressures she's carrying into the room. Each one is a story she has to tell the CEO, the CFO, and the new CRO — and the numbers behind it are not as clean as the slide makes them look.

PAIN	WHAT IT MEANS FOR HER	URGENCY
Pipeline quality vs. quantity	Demand gen produces MQL volume; sales ignores 60–70% of it. The CRO calls it a marketing problem. She calls it a sales problem. The CFO watches both arguments and calls it a leadership problem.	HIGH
Marketing attribution in CFO terms	She can't prove marketing ROI in a way that survives a board review. Last-touch attribution makes the numbers look good. Everyone in the room knows it's wrong.	HIGH
CAC efficiency collapse	Paid acquisition costs up 40–60% post-iOS 14. Same budget produces materially less pipeline. Board expectations haven't adjusted. She's doing more with less and being measured on the old benchmarks.	HIGH
Content commodity problem	Every competitor publishes the same AI-generated thought leadership. Volume up, differentiation down, pipeline per piece declining. The answer everyone suggests is "more content." The answer is wrong.	HIGH

This brief took hours to build for a *generic* B2B SaaS CMO. **BIA generates this for any enterprise buyer persona** — your role, your vertical — in 30 seconds.

[GetBuyerIntel.ai](https://getbuyerintel.ai)

This brief told you *what*. BIA handles *the how*.

This cheat sheet shows you what to know about a B2B SaaS CMO. BIA converts that intelligence into action.

01 · OUTREACH

Cold outreach built on what her buyer actually reads — not what her content team thinks they want.

BIA generates a full outreach sequence calibrated to how this specific CMO processes vendor emails, what subject lines survive her filter, and which of her current pipeline pressures gets a response. **Your first email writes itself — in 30 seconds.**

02 · REHEARSAL

Practice the analyst and board conversation before you walk in.

Have a live conversation with an AI CMO who challenges your attribution methodology, pushes back on your CAC improvement claim, and asks which comparable Series C CMO is using your tool. **Get scored before your rep touches a real evaluation.**

03 · REVIEW HUB

See your messaging through her buyer's eyes before it goes live.

BIA's review hub audits your copy, email sequences, and landing pages against ICP language in real time. **The gap between how you describe your product and how her buyer thinks about their problem is bigger than you think.**

04 · BATTLECARDS

Personalized competitive battlecards in 30 seconds — not a stale spreadsheet.

BIA sources real customer reviews from G2, Capterra, and Reddit to show exactly where your competitor falls short for this specific CMO's buying criteria. **Formatted, visual, ready to use in the room.**

FIX THIS NOW

The vendor calling her next week already has a CMO-specific intelligence brief. They know her CRO's objections before she does. Your rep doesn't. → getbuyerintel.ai/Simulator/

The full intelligence *stack*.

Everything in this cheat sheet came from the surface layer. The full B2B SaaS CMO intelligence stack inside BIA includes six tools this brief can't fit.

- 01 **44-Question Discovery Bank** MEMBERS
Includes 8 *trap questions* that reveal whether the problem is pipeline quality, attribution methodology, or board expectation misalignment.
- 02 **6 Active Buying Triggers** MEMBERS
CMO replaced; new CRO calling everything "broken"; Series C closed and growth targets jumped; board mandated a CAC efficiency review.
- 03 **Trigger-to-Stakeholder Map** MEMBERS
When a new CRO joins, **three marketing budget conversations activate simultaneously** — and the CMO is usually not leading them.
- 04 **Risk & Trust Profile** MEMBERS
9 trust signals and 8 deal-killers, including the 3 questions a B2B SaaS CFO asks in the first 10 minutes of any MarTech review.
- 05 **Day-in-the-Life Narrative** MEMBERS
The demo where the CMO has already decided the problem is the CRO, not the tool — and you need to know that before you walk in.
- 06 **"How Not to Lose" Guide** MEMBERS
Why qualified MarTech deals die in stack rationalization reviews, not in the business case.

FIELD INTELLIGENCE

This is what your **most aggressive competitor** pulls before every CMO call.

Who's actually *in the room*.

The CMO doesn't sign alone. These six co-own the budget, the metric, or the stack — and any one of them can stall the evaluation quietly.

STAKEHOLDER	VETO TYPE	WHAT THEY NEED FROM YOU
CRO / VP Sales	PIPELINE QUALITY CO-OWNER	If the CRO isn't bought in, the CMO can't fix the MQL→SQL handoff problem regardless of what you sell her. Ask who defines SQL criteria before you pitch anything.
CFO	BUDGET SCRUTINY	B2B SaaS CFOs model CAC payback period and LTV:CAC ratio. Bring a 12-month ROI model in SaaS financial language — not marketing metrics — or the CFO blocks the budget.
VP Demand Generation	EXECUTION OWNER	They run the programs you're selling into. If they see this as a threat to their headcount or methodology, they will quietly kill the evaluation before it gets to contract.
RevOps / Marketing Ops	INTEGRATION VETO	They own the MarTech stack and CRM configuration. "Does this integrate with Salesforce?" is the first real question — and the honest answer determines the honest timeline.
CEO	GROWTH ACCOUNTABILITY	At Series B–D, the CEO still closely tracks pipeline-to-ARR math. If this isn't framed as a growth investment with a clear ARR thesis, it reads as overhead.
Board / Investors	BENCHMARK PRESSURE	Investors compare CAC, LTV, and pipeline efficiency against portfolio benchmarks. The CMO needs a vendor who helps her tell a better story — not add complexity.

WINNING SEQUENCE

CRO alignment before CMO commitment. The MQL quality problem is a joint problem with a joint owner. If the CRO doesn't endorse the solution, the CMO's investment doesn't move the metric.

Scope note • This profile covers Series B–D B2B SaaS companies (\$25M–\$120M ARR). At pre-Series B, the role is usually a VP of Marketing — budget authority is the same but board reporting dynamics and CFO scrutiny are different.

Three questions that open the *real* conversation.

01 *When your CRO looks at the leads marketing delivers, what's the first word they use — is it a volume problem, a quality problem, or a timing problem?*

USE WHEN • POSITIONING AROUND MQL-SQL ALIGNMENT, PIPELINE QUALITY, REVENUE MARKETING

02 *Attribution methodology is hard to defend in a CFO conversation because multi-touch models all have assumptions baked in. How are you currently building the pipeline number for marketing — and how does that hold up under scrutiny?*

USE WHEN • ATTRIBUTION METHODOLOGY, PIPELINE REPORTING, MULTI-TOUCH ATTRIBUTION TOOLS

03 *Your content — are you publishing more of it this year than last, and is it generating more pipeline per piece, or less?*

USE WHEN • CONTENT STRATEGY, DEMAND GEN, AI CONTENT TOOLS, SEO

What kills credibility in the *first five minutes*.

- ◆ **Pitching "more leads."** Her problem is almost never lead volume — it's quality and sales adoption. Walk in pitching volume and you've told her you didn't research the company.
- ◆ **Using vanity metrics.** Impressions, MQLs, social engagement as proof of value classify you as a vendor who doesn't understand revenue marketing.
- ◆ **Not knowing their CRM stack.** Salesforce vs. HubSpot is the entire integration conversation. If you haven't confirmed before the meeting, you lose 20 minutes.
- ◆ **Claiming your tool "integrates with everything."** Name the specific integrations — Salesforce + Marketo + 6sense + Gong — or name the gap and own it.
- ◆ **Not acknowledging the MQL graveyard.** Every B2B SaaS CMO has a category of leads that sales won't touch. Not naming it signals you're selling to a company that doesn't exist anymore.
- ◆ **Assuming brand and demand gen budget are separate.** At Series B–D, they compete for the same \$2M–\$5M line. Don't pitch a brand play to a CMO measured on pipeline.

What she's *really* asking.

The CMO is polished. She's also defending three budget conversations she didn't start. What she asks and what she's evaluating are not the same thing.

WHAT SHE ASKS	WHAT SHE'S ACTUALLY EVALUATING
<i>“How does this fit into our current MarTech stack?”</i>	I just cut three tools in a stack rationalization. I need the real integration effort, the real Salesforce configuration requirement, and who on my team owns it after the kickoff call.
<i>“Can you walk me through a customer case study in B2B SaaS?”</i>	My board will ask who else is using this. If the answer is "companies like yours" with no names attached, I can't justify the spend in a budget review.
<i>“What does implementation look like?”</i>	I have 0.5 of a marketing ops person available. If implementation requires a 90-day project, it dies before we get to value.
<i>“How do you handle attribution?”</i>	My CFO doesn't believe last-touch. My CRO doesn't believe first-touch. Tell me the one number I can put in a board slide that both of them will accept.
<i>“Can you show me what other CMOs use this for?”</i>	I want proof that someone in my exact situation — post-Series C, pipeline pressure, a CRO relationship not fully repaired — actually used this and it moved the number.

40+ buyer personas. Any vertical. Personalized to your product. 30 seconds.

Rehearse the board attribution conversation with an AI CMO before your rep walks into the real one.

getbuyerintel.ai/Simulator/

The three objections you *will* hear — and what to say.

OBJECTION • 01

“We’re in the middle of a MarTech rationalization.”

ROOT FEAR

I just defended cutting three tools to my CEO. Adding another one before I show ROI on the cuts would undermine the narrative I built to get the cuts approved.

WHAT ACTUALLY MOVES HER

Position as a consolidation play — show which tools this replaces or reduces dependency on, not what it adds. The net tool count should go down.

SAY THIS

"I actually want to start by showing you what this replaces in your current stack, not what it adds. Based on what you're running, I think the net tool count goes down. Can I walk through that first?"

OBJECTION • 02

“Sales won’t use it if I buy it.”

ROOT FEAR

I have a graveyard of MarTech investments that sales agreed to in the demo and ignored on Monday morning. My credibility with the CRO can't absorb another one.

WHAT ACTUALLY MOVES HER

Bring the CRO or VP Sales into the next conversation explicitly — or walk away now. This is the only move that works.

SAY THIS

"That's exactly the right concern, and I don't want to ignore it. Can we get your CRO in the next conversation? If they're not bought in from day one, I'd rather know that now than after you've invested time in an evaluation."

OBJECTION • 03

“We need to see ROI before we commit to a full contract.”

ROOT FEAR

I've bought tools that looked good in the demo, sat unused for six months, and got called out in a board operations review. My risk tolerance for new vendors is low.

WHAT ACTUALLY MOVES HER

Propose a bounded 60-day pilot with two specific, pre-agreed measurable outcomes tied to pipeline or cost per SQL — defined before the pilot starts.

SAY THIS

"Let's define two metrics before the pilot starts that would make this an obvious yes for your CFO — pipeline influenced and cost per SQL. If we hit them in 60 days, the renewal conversation writes itself."



What you're actually *competing against*.

Most deals don't lose to a competitor. They lose to one of these three.

- ◆ **The CRO who has already decided the problem is marketing's fault.** If the CMO is in a fractured relationship with the new CRO, every tool evaluation becomes a proxy battle. The vendor who helps the CMO build a shared language with the CRO wins. The vendor who only talks to marketing loses.
- ◆ **The existing stack tool that "kind of does this already."** There's almost always a tool in the stack that does 60% of what you do. Her team will surface it before you do. Name it first, explain the gap, and show the cost of running on 60% of the solution.
- ◆ **Board pressure to cut MarTech spend, not add to it.** Post-2023 SaaS efficiency era, most boards are scrutinizing software spend. "It was the best in the demo" isn't enough. She needs an ROI model she can defend in a board operations review.

RUNNING A TEAM THAT SELLS INTO MARKETING LEADERS?

The CMO you're calling this week is already in **two budget conversations she didn't start**. The rep who walks in knowing her CRO's objections before they're spoken closes faster. Your reps walk in knowing all of it.

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