The Shortlist: Written Months Ago

RELEVANCE
CREDIBILITY
PROOF
SAFETY
ACCESS

How to Get on a B2B Shortlist Before the RFP Exists

Why 94 percent of buying groups rank their preferences before they speak to anyone

> The whistle blows on a field that was tilted months ago.

B2B MARKETING IN THE AGE OF ARTIFICIAL INTELLIGENCE

THE DECISION SEQUENCE

MARKETING BUILT AROUND HOW PEOPLE DECIDE

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The whistle blows on a field that was tilted months ago.

In 1983, a marathoner named Brian Maxwell hit the wall late in a race he'd been leading.

He was good. A 2:14 marathoner, third-best in the world at one point. He'd burned through everything his body had stored and he still had miles to run. Physiologists call that glycogen depletion, which is like calling a four-alarm house fire a simple combustion event. Runners call it the wall, and the wall doesn't care how fit you are.

He kept running and finished seventh, which is the part of the story I like. The wall beat a man who refused to stop for it.

So he started cooking in a Berkeley apartment with about fifty-five thousand dollars, most of it his fee from a Xerox commercial, and in 1986 the PowerBar went on sale. Chocolate and Malt-Nut. Thirty-nine dollars for three dozen by mail order, promoted with flyers stuck under windshield wipers in race parking lots.

Here's the part worth stealing.

They skipped advertising and gave the bars away at races. Free, in bulk, to runners who hadn't bought anything and might never buy anything, in the middle of the event rather than at the finish or the expo table.

I've come to think of that as arriving at mile eighteen. Not at the finish line, where a bar is a nice gesture. Not at the expo, where it's a sample. Somewhere out on the course, before the failure the runner can already feel coming.

Now consider what the runner does next. Race day arrives and the first rule of endurance sport is nothing new on race day. You do not experiment with fuel when the outcome matters. Which means the bar that got handed to you at mile eighteen of some Tuesday-evening 10K, when nothing was at stake, is the bar you'll carry when everything is.

The gift wasn't the bar. The gift was arriving at the moment of maximum uncertainty with something useful and no invoice.

The company eventually sold to Nestlé for $375 million. And somewhere in the years after, it did what most successful companies do. It moved its attention from the course to the checkout.

Your Buyer Has a Mile Twenty-One

Every buyer you want has a moment where the thing they're carrying gets heavier than they expected.

The general counsel who realizes the regulatory exposure is bigger than the memo suggested. The CFO who understands that the audit committee is going to ask a question nobody has prepared for. The founder who has been telling himself the succession problem is next year's problem.

That moment is not a purchase. It's a wall. And it happens long before anybody in your firm knows a decision exists.

Which is why the sequence can't open with an ask. Entry 12 covers the research on reciprocity and the give-first structure, and the mechanism is older than marketing. Value delivered before anything is requested changes what the request means when it finally arrives. The cynical reading is that the buyer feels indebted. The real mechanism is that you've already demonstrated the thing the ask would otherwise be asking them to take on faith.

The firm that showed up at mile eighteen has answered the question. The firm that shows up at the finish line with a proposal is asking it.

Ninety-Four Percent

One number should change how you think about your calendar.

6sense, in its 2025 Buyer Experience Report, asked buyers a direct question: were you able to put your shortlist in order of preference before engaging with sellers?

Ninety-four percent said yes.

And they bought from that preliminary favorite seventy-seven percent of the time. *(Nearly 4,000 respondents plus a companion survey of 766. 6sense sells account-based marketing software, so the finding flatters their business. It's also the most direct measurement of this that exists.)*

Read it twice, because the implication is worse than it sounds.

By the time a formal buying process begins, the ranking already exists. The RFP, the capabilities presentation, the reference calls, the proposal, the negotiation, all of that ceremony happens on top of an order of preference that was established before anyone at your firm knew the client was looking.

You are not competing to win the evaluation. You are competing to have been the favorite before the evaluation started.

Forrester's 2025 buyer research points the same direction: sixty-eight percent of B2B buyers already have a front-runner in mind at the very start. And 6sense found that more than ninety percent of buying group members had personal experience with at least one vendor already under evaluation.

The field isn't level when the whistle blows. The whistle blows on a field that was tilted months ago.

I Spent Years on the Other Side of This

Before I did any of this for a living, I sat on the capital side as a partner in private equity and venture, and I should tell you what that did to my understanding of everything above.

Firms wanted our business. Law firms, accounting firms, consultants, bankers, all of them, and they sent things. I can describe with some precision what happened to most of it, because I'm the one it happened to.

I never once built a shortlist by reviewing submissions.

By the time we needed somebody, two or three names were already sitting in my head. They'd gotten there through some combination of a person I trusted saying something in passing, and material I'd read at a moment when I wasn't shopping for anything at all. The formal process ratified a preference that already existed. I'd have told you at the time that I ran a rigorous evaluation, and I did run one. It just wasn't the part that decided anything.

The firms that reached me were rarely the ones with the best follow-up discipline. Several of the most persistent never got considered for anything, and I couldn't have told you their names a month after they stopped calling.

What reached me was a specific kind of thing, and it took me twenty years to work out why. Somebody had written something that described a problem I was living with, at a time when I hadn't yet decided the problem needed outside help. I read it because it was useful. I remembered the firm because the usefulness had a name attached.

That's the whole mechanism, observed from the inside of the buyer's head, and every number in this paper is a measurement of it.

The uncomfortable part is that I went on to spend years advising firms to do the opposite. Sharpen the follow-up. Tighten the pitch. Improve the deck. All of it aimed at a window that had already closed before anybody opened it.

Where the Ranking Comes From Now

So what builds that preliminary order?

G2 asked, surveying 1,169 B2B decision-makers in April of 2025, and the answer has changed in a way most firms haven't priced.

The single largest influence on vendor shortlists is now generative AI chatbots, at 17.1 percent. Software review sites follow at 15.1. Vendor websites come in at 12.8. Market research firms at 10.6. Peers and colleagues at 8.9. Salespeople, last, at 8.8. *(G2 runs a review platform, and review sites finishing second is convenient for them. The relative ordering is still the most useful thing published on this.)*

Look at the bottom of that list. The two channels professional services firms invest in most heavily, the relationship and the pitch, are the two least influential in deciding who makes the list at all.

Look at the top of it. The channel with the largest influence is one nobody in your firm has ever spoken to.

Relationships still work. What changed is that they now operate downstream of a sort they never used to sit behind, and a firm that only invests where it can see the buyer is investing in the last twenty-three percent of the decision, which is the share this paper is about to derive.

The Click Stopped Happening

There's a companion finding to that list, and it removes the instrument most firms use to measure any of this.

SparkToro's June 2026 analysis of American search behavior put zero-click searches at 68.01 percent. Two-thirds of searches now end where they started. The answer arrives inside the result, and the visit that used to follow it doesn't happen.

Amanda Natividad, who runs marketing at SparkToro, has spent a few years making the practical argument attached to that number, and she calls it zero-click marketing. The short version: put the value where the audience already is, complete on arrival, and stop engineering everything to produce a click that fewer and fewer people are going to make.

I read that and recognized it, which was a slightly humbling hour.

It's value-first delivery with the distribution problem solved. I've been arguing for years that you give away the thinking before you ask for anything, and I've been arguing it as a trust mechanism, which it is. She's describing the same behavior from the delivery side. The click is disappearing, so the value has to be whole wherever it lands. Two directions, one instruction: what you publish has to be worth something to a person who never arrives at your site.

Her audience is mostly marketing teams with content programs and somebody whose actual job this is. Yours may be a forty-person firm where the nearest thing to a content program is a partner who writes when a matter closes. The instruction survives the translation, and it gets easier rather than harder on the way across, because a firm that publishes six things a year has no volume strategy to defend.

What Value Is Not

Here's where most firms hear "deliver value first" and do the wrong thing at scale.

Your prospects are drowning in content. Firms do produce more of it than they used to. The bigger change is that producing genuinely useful-sounding material became free of charge. Every competitor you have can generate polished, problem-focused, insight-laden articles in the time it takes to write a decent subject line.

So volume stopped being evidence of anything. Publishing more is now the cheapest available signal, which means it carries the least information.

Value, in the sense that matters here, has three properties, and none of them is length.

It arrives before it's requested. A useful thing offered after a prospect identifies themselves is a sales asset. The same thing offered before is a gift, and the difference is entirely in the timing.

It costs you something to produce. Not money. Judgment. The observation only somebody who was in the room could make. The pattern nobody else has named. If a competitor could generate it from a prompt, the buyer can too, and you've handed them nothing.

And it's useful whether or not they hire you, which is the hard one. Material engineered to be useless without an engagement isn't value, it's a demo. The test is whether a prospect could act on it alone and be better off. If they can't, you've written a brochure with a longer word count.

Entry 24 puts the scholarship underneath a distinction marketing somehow managed to forget. The discipline's foundational thinkers did not define marketing as promotion. Drucker, Levitt and Kotler began with understanding the customer's need, creating the appropriate fit and making the resulting decision easier. Promotion belonged inside marketing. It was never supposed to become the entire job.

AI has made promotion abundant. It has not made decision support abundant, because helping someone decide still requires understanding the situation, the uncertainty and the consequences well enough to be useful.

The test fits into one question: what decision does this help someone make? If the only answer is "whether to learn more about us," it is promotion wearing the clothes of value.

Disconnected content proves you're publishing. A coherent body of work creates recognition.

What to Publish, If You Only Ever Do One Thing

Firms ask me for a content strategy and I've stopped giving them one, because the document always outlives the behavior. So here's the smaller version, which is what survives.

The unit isn't a piece of content. It's a piece of judgment.

Somewhere in your firm this month, a partner answered the same question three separate times for three separate clients. Different companies, different circumstances, same underlying question. That repetition is the signal. It means the question is common enough to matter and hard enough that people with real problems are paying to have it answered.

Write that answer down. Not the polished version. The version you gave the third client, after the first two taught you which parts they didn't need.

That's the whole editorial calendar. Whatever you found yourself explaining more than twice.

A few rules that make it work, and they're all subtraction.

Name what you'd turn down. A piece that says here's how we approach this problem is common. A piece that says here's when this approach is the wrong one, and here's who you should call instead, is nearly extinct, and it does something no volume of the first kind will do. It costs you something visible. Nobody fakes turning away work.

Write to twenty people, by name. Not a persona, not a segment. Twenty actual human beings you'd like as clients, whose companies you could describe from memory. If you can't picture one of them nodding at a specific sentence, that sentence is doing nothing. This is the discipline behind the partner and his three trade publications, and it's why his version worked when a broadcast version wouldn't have.

Set the cadence to what the firm can sustain in a bad quarter, then never miss it. Six pieces a year that arrive is a body of work. Twenty-four planned pieces that produce nine is a firm that started something.

And put it where the record forms, which is the part firms skip. The piece on your site is one source asserting something about itself. The same thinking in a trade publication, on a panel, in somebody else's podcast, quoted in an association newsletter, is the same claim arriving from four directions. Chapter four covers why that matters mechanically. Chapter five covers why the words have to match. For now: publishing it only where you own it is publishing it once.

None of this requires a marketing department. It requires a partner who's willing to write down the thing they already know, on a schedule, without asking for anything in the paragraph after it.

The Delayed Ask

Every instinct in a professional services firm fights this, and the instinct has a good reason behind it.

Partners have finite hours. Business development is unbilled time. Giving away thinking to somebody who may never sign anything looks, on a time sheet, exactly like waste.

I've run the arithmetic on the other side of that and it doesn't hold.

The research on proactive versus reactive selling is worth knowing here, with a caveat attached. Emblaze, the research arm of Corporate Visions, reports that proactively created opportunities win at 33 to 41 percent while buyer-initiated ones win at 18 to 25 percent, and that sellers with proactive habits generate 19 to 30 percent higher annual revenue. *(That report is member-gated and publishes no sample size or field dates. It's vendor research and should be weighed as such. I include it because the direction matches everything else in this paper, not because the decimals are trustworthy.)*

Roughly double the win rate on opportunities you created versus opportunities that arrived. Which is another way of saying the same thing the shortlist data says: the deal is mostly decided by who was there first, and being there first is a choice about where you spend unbilled hours.

The firms waiting to be discovered are competing for the twenty-three percent of deals that weren't already settled.

The Sentence Somebody Can Say in a Meeting

There's a finding that gets misread in this category constantly, and getting it right matters for the next paper.

Wynter surveyed a hundred B2B software marketing executives and found word of mouth and peer recommendation ranked as the single most influential factor in deciding which vendors to consider, with seventy-three percent putting it first. *(A hundred people, all in SaaS, in 2024. Small and narrow, and I'd hold it loosely if it stood alone.)*

It doesn't stand alone. LinkedIn's B2B Institute, working with Bain across 750 senior B2B buyers, found peer recommendation three times more influential than whether an option was cheaper or claimed better performance.

Three times. Against price. Against performance.

The standard reading is that people trust their friends. True, and not the interesting part.

The interesting part is that a peer recommendation is the only piece of evidence in a professional services decision that the buyer didn't have to generate themselves and doesn't have to defend alone. "Companies like us use them" is a sentence somebody can say in a meeting and survive. Every other input on the list is a claim the buyer has to personally vouch for.

That thread runs into chapter four, and it starts here rather than there because reciprocity is what produces it. The people who recommend you are, overwhelmingly, people you gave something to before you asked for anything.

Twenty Minutes Before a Question Gets Asked

I'll give you the smallest version of this, because the large version sounds like a program and the small one is what gets done.

A firm I worked with had a partner who read three trade publications every morning and forwarded relevant items to clients. Nothing else. No commentary at first, just the item and a line about why it mattered to that particular reader.

We changed one thing. Instead of sending to clients, he sent to the twenty people he most wanted as clients, and he stopped forwarding anything he hadn't read closely enough to say something specific about.

Volume went down by roughly ninety percent. Two to three sends a week instead of twenty.

Inside a year the referrals had climbed enough that the partners noticed without being told to look. And a large share of them came from people who had never signed an engagement letter with the firm. Not clients. People who'd been handed something useful, repeatedly, by somebody who clearly wasn't selling.

You'll notice I didn't give you a percentage there, and I want to explain why, because it applies to every client result in this series.

I have the recollection. I don't have the paper trail. I watched that firm's referral pattern change and I can describe the shape of it honestly, but I can't hand you a document that proves a number, and a book that spends a chapter telling you unverifiable specifics are a liability cannot then spend the next paper carrying its own.

So the rule I gave that architect applies here. If a number can't be produced in five minutes, it comes out and gets replaced with what's verifiable. Every published statistic in this series has a named source, a sample size, and a date. Every client story has a mechanism you can test against your own practice, and no decimals I can't defend.

That trade costs the book some rhetorical punch. It buys something I'd rather have.

What I'd defend more strongly than the number is the mechanism, and the mechanism is boring. He gave away twenty minutes a day of attention he already had, to a list of twenty people he'd chosen deliberately, without asking for anything, for long enough that it stopped looking like a tactic.

That's the whole program. Most firms won't run it, because it doesn't produce a deliverable and it can't be reported on for eleven months.

How You'd Know

A managing partner reaches this point and asks a fair question. If the decisive period is invisible and the click is going away, how would anybody tell whether the money is doing anything?

You give up attribution and measure the market instead.

Attribution asks which touch produced the client, then answers by crediting whichever touch happened to be traceable. That's how the last click ends up taking credit for a preference formed eleven months earlier in a conversation nobody logged. Incrementality asks a duller question with a better answer behind it. What happened where we did this, compared with where we didn't?

That's a holdout. Two comparable metros, one gets the program and one doesn't. Or two practice groups. Or two industry segments, if geography isn't how your market divides. Run it long enough for the pipeline to turn over, then compare. It's ancient, unglamorous, and still the cleanest instrument available.

Underneath that sits a set of measurements most firms have never taken because nobody told them these were measurements. Six of them, and they read in order, from the earliest signal to the one that shows up in the bank.

Where you're mentioned that you didn't put yourself. Third-party references, citations, an association newsletter quoting you, somebody else's post arguing with something you wrote. This is the earliest indicator you have, and it moves months before anything else on the list. It's also the only one that measures whether the record is forming, which chapter four will explain is the thing the machine is reading.

Whether people come looking by name. Branded search, direct visits, subscribers, readers who come back. A firm being discovered is a different event from a firm being sought, and only the second one compounds. Most analytics packages can separate these and almost nobody looks.

What the machines say about you. Write down ten questions. Who are the best firms for this problem in this market. What does this firm do. What kind of client does this firm serve. Who should a company like mine call about this. Run them against the major systems, record the answers verbatim, and do it again every quarter.

That last one deserves a sentence of emphasis, because it costs an hour and almost no firm has done it once. You will find out, in about forty minutes, what the front door of your market says about you. Some of it will be wrong. The wrong parts are a work order.

The language prospects hand back to you. This is the best measurement in this paper and it doesn't involve a number at first. When somebody arrives in a first meeting already using your framing, describing their problem in the words you published, your material got there before you did. Track it. Note the phrase, note the meeting, note whether they knew where they picked it up, which they usually won't. Twenty of those and you have evidence no dashboard produces.

Its twin is subtraction. Objections that used to come up every time and have stopped coming up. If nobody asks whether you have experience in their industry anymore, something answered it before the meeting started.

The commercial numbers, read differently. Qualified opportunities rather than inquiries. Time from first contact to decision. Win rate specifically on work you weren't asked to bid against anybody for, which is the cleanest single indicator of preference in this whole chapter. Average engagement value, because being chosen for judgment rather than availability shows up in the price.

What people keep asking you for. The question that arrives repeatedly is a market telling you where the demand is, and the firm that treats its inbox as research is running a study nobody else in its category has funded.

Not one of those six requires anyone to click on anything.

And if all of that is more than your firm will sustain, there's a cheaper version, and it's the question almost nobody asks. Every new client, in the first meeting, gets asked how long they'd known about the firm before they picked up the phone. Write the answers down. Thirty of them will tell you something no dashboard will, which is the true length of the period you've been treating as noise.

The Cost of Being Findable and Nothing Else

Everything in this paper is a claim about time, so here's the summary in those terms.

If ninety-four percent of buying groups rank their preferences before making contact, and the preferred vendor wins seventy-seven percent of the time, then the period during which your marketing has the most influence is precisely the period during which you have the least visibility into whether it's working.

That's an uncomfortable investment case. It's also the actual one.

The firm optimizing for the visible part of the funnel is optimizing the last twenty-three percent of a decision. The firm building recognition before anyone identifies themselves is playing for the other seventy-seven, and won't be able to prove it for a year.

Being at the finish line with a proposal is easy to measure and mostly too late. Being at mile eighteen with something useful is hard to measure and mostly why you win.

Pick accordingly.