Right Message, Wrong Person, Wrong Week

RELEVANCE
CREDIBILITY
PROOF
SAFETY
ACCESS

How to Segment B2B Prospects and Time Your Outreach

Why the same message lands with one buyer and stalls with another who looks identical on paper

> He was five years early.

B2B MARKETING IN THE AGE OF ARTIFICIAL INTELLIGENCE

THE DECISION SEQUENCE

MARKETING BUILT AROUND HOW PEOPLE DECIDE

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In the early 1940s, two rural sociologists named Bryce Ryan and Neal Gross drove out to Greene County, Iowa, and started knocking on farmhouse doors.

They were interested in hybrid seed corn, which by any rational measure was one of the easiest sells in the history of agriculture. It produced roughly 20 percent more corn per acre. It stood up better to wind and drought. The seed companies had demonstration plots, salesmen, and free samples. And the product had been commercially available since 1928.

Ryan and Gross interviewed the farm operators of two communities there, a little over two hundred and fifty of them, and asked a simple pair of questions. Where did you first hear about hybrid seed corn? And what made you plant it?

Forty-nine percent named a salesman as the source of first knowledge.

Then they asked what had caused them to plant it, and the answer moved. Neighbors came first at 45.5 percent. Salesmen dropped to 32.

And the timing is the part that ought to bother anybody who does business development for a living. Roughly five years passed between a farmer first learning about hybrid corn and planting his first acre of it. Then about three more years before he'd converted his whole operation. Eighty percent of the adoption in those two communities happened between 1933 and 1939, which is to say five to eleven years after the thing was available, from farmers who'd known about it the entire time.

The salesman had a genuinely superior product and told the truth about it. Nothing was wrong with the pitch.

He was five years early, talking to a man whose decision was going to be made by the guy on the next farm over.

Wrong Person

Start with the easiest of the three failures to fix, which is that most professional services firms are still writing to a person.

Chapter five gave you Forrester's count. Thirteen internal stakeholders and nine outside influencers in a typical B2B buying decision, and those groups roughly double when the purchase involves AI capabilities. Twenty-two people, minimum.

Your outreach is written to one of them. Usually the one with the best title, because that's the one your CRM has.

But the general counsel isn't your problem. The general counsel is probably favorable. Your problem is the CFO who has to sign, the operations director who used your competitor at her last company and had a bad experience she's never described in detail to anyone, the board member who'll ask one question in one meeting, and the internal candidate who wanted this work brought in-house and now has a reason to find fault with everyone external.

Every one of those people encounters your firm through a different door, in a different week, in a different mood, and most of them will never identify themselves to you.

Which reframes what personalization is for. It isn't a technique for making one person feel seen. It's a discipline for making sure the material reaches twenty-two people who have twenty-two different jobs and one shared anxiety, and that it doesn't say anything so specific to one of them that it reads as irrelevant to the other twenty-one.

The Numbers I'm Not Going to Give You

I did this exercise on the last chapter and it isn't getting shorter, so I'll compress it.

Everything I once cited to justify segmentation and personalization in professional services fell apart under checking. Fifty-eight percent of B2B revenue from segmented email traces to a UK direct marketing survey of about seventy-three mostly-transactional senders, and the real figure in the real report was 55 percent, in a different year, measuring email-channel revenue rather than all revenue. The 72 percent engagement lift has no source at all. The 80 percent conversion increase appears verbatim on one software vendor's listicle and nowhere else on earth. Seventy-seven percent of buyers refusing to purchase without personalized content turns out to be 205 marketing and sales professionals saying they *believe* personalization improves customer relationships. Sixty-three percent never responding to generic outreach is 2,200 consumers in 2015 saying generic messaging annoys them. Seventy-four percent frustrated by irrelevant content is 2,091 US adults on a non-probability web panel in 2013, talking about ads on websites.

The six-times transaction rate is real, and it's Experian, 2013, measuring retail email. A CPA firm doesn't have a transaction rate.

None of them observed a professional services buyer. Several of them observed marketers describing their own opinions about marketing, which is the least reliable population in the entire discipline and the one that generates most of its statistics.

The framework in this paper survives without them. It came out of client work, not out of a slide someone handed me, and I should have noticed the difference sooner.

The Finding That Argues With Me

Here's the one I'd have preferred not to find, and the paper is better for it.

Gartner surveyed 1,464 buyers across North America, the UK, Australia and New Zealand in November and December of 2024, a mixed sample of B2B buyers and consumers, and published the results in June of 2025. Fifty-three percent reported that personalization had a *negative* effect on their purchase experience.

The people who experienced it that way were 3.2 times more likely to regret the purchase and 44 percent less likely to buy again. They were twice as likely to feel overwhelmed by the volume of information and 2.8 times more likely to feel rushed.

More than half of buyers feel overwhelmed or hurried by standard personalization tactics at least once in a purchase.

So I spent a week with that, because a paper arguing for segmentation has to answer it.

The answer sits in Gartner's own analysis, and it's a distinction I'd been making badly for years without having language for it.

The damage happens at the moment the buyer switches tasks, moving from gathering options to choosing between them. That's the point where the problem stops being informational and starts being personal, where the buyer is weighing what this decision says about their judgment. A recommendation engine arriving at that moment with three more options and a note about what people like you also viewed is answering a question the buyer stopped asking.

What worked was what Gartner calls active personalization. Interactive experiences where the buyer reveals their own situation and gets clarity back. Buyers who got that were 2.3 times more confident about completing the purchase.

Here's the translation for a professional services firm, and it's the whole paper in one line.

Personalization that demonstrates you've been watching the person makes them feel surveilled. Personalization that demonstrates you understand the problem makes them feel understood.

"*I noticed you downloaded our whitepaper on succession planning*" is the first kind. It proves you have analytics. It tells the reader nothing they didn't know and reminds them they're being tracked.

"*Most owner-operators we talk to have already decided who's taking over and haven't told that person yet, which is where the tax problem usually starts*" is the second kind. There's nothing personal in it at all. It just happens to describe the reader's Tuesday.

That's intellectual proximity, and it's the only kind of personalization that has ever worked in this category. The sense that the advisor understands the problem from inside the client's world.

Wrong Message

So how do you write the second kind at scale, to twenty-two people you can't see?

> *You stop segmenting by what's in your CRM.*

Most firms sort prospects into small business, mid-market, and enterprise, which is roughly as useful as sorting animals into things that move and things that don't. Technically accurate, useless for making a decision.

Take two mid-market companies. Same revenue, same industry, both run by a forty-five-year-old with a comparable education. On a list, they're the same row twice.

One is founder-led. The owner has direct decision authority, high risk tolerance, and can commit in a hallway. The other is private-equity owned, with a governance structure, conservative mandates, and a procurement process. Their decisions have about as much in common as a Ferrari and a school bus.

Two law firms with similar revenue might hire outside counsel for entirely unrelated reasons. One is managing overflow. The other is looking for a strategic partner on complex litigation. Send both the same pitch and you've guaranteed that neither of them thinks it was written for them.

What you want is a behavioral archetype, which is a description of how a client type thinks, decides, and needs to be talked to. Decision style. Risk tolerance. Cognitive bias pattern. Validation threshold. What evidence they need, in what volume, from what source, before they'll commit.

Some clients decide like a surgeon. Methodical, detail-driven, process-oriented, and they'll want to see the whole approach before they'll agree to any of it.

Others decide like a fighter pilot. Rapid assessment on partial information, high confidence, gut instinct, and they get impatient somewhere around minute four of your methodology.

Send both the same materials and one of them concludes you're recklessly hasty while the other concludes you're painfully slow. Both of them are reading the same document.

Entry 23 adds an important correction. These are not necessarily fixed personality types. Involvement changes how deeply the same person processes different decisions. An executive can interrogate one choice like a surgeon and move through another like a fighter pilot, depending on what is at stake, how personally relevant the outcome feels and how much uncertainty must be resolved.

As involvement rises, buyers tend to think more systematically, demand stronger evidence and become less willing to entertain claims that sit far outside what they already believe. They do not merely read more carefully. Their acceptable range becomes narrower.

A useful behavioral archetype therefore has to describe more than how the person generally decides. It has to account for how much this particular decision matters to that person right now. Otherwise, you have profiled the temperament and missed the decision.

A corporate law firm I worked with couldn't get traction with startup clients until we stopped segmenting by revenue and started segmenting by how the money arrived. Bootstrapped founders got messaging about scrappy, efficient solutions. Venture-backed companies got systematic process and risk management. Established tech companies got scalability and time efficiency. Conversion moved sharply, quickly, and the service never changed at all.

I'll follow the rule from chapter three and leave the multiple out. I remember the shape of it and I can't produce the file.

Wrong Week

Now the part that separates this from every other segmentation framework, and the part Ryan and Gross were pointing at in Iowa.

Knowing who to talk to doesn't tell you when.

Everett Rogers built diffusion theory on that hybrid corn data, describing how populations adopt an innovation in a predictable order. Professional services is a different animal, because the client isn't adopting a product. They're handing their most consequential problem to a stranger. The stakes are higher, the evaluation is longer, and the influence patterns are more tangled.

So the model needs adapting rather than borrowing. Five segments, each with its own timing, its own validation requirement, and its own reason for saying yes.

Anchor Clients. The Alpha Competitor. Competitive, frequently self-made, motivated by winning and by exclusivity. Decision psychology: *I trust my gut.* Energized rather than frightened by being early. A track record does nothing for them, because a track record is what everybody else gets. What moves them is something available only to whoever goes first. Preferred economics, an advisory seat, direct access to the senior person, a hand in how the service develops.

The founding partner of a boutique private equity firm who wants his law firm to behave like a strategic partner rather than outside counsel. The founder-owner of a mid-market manufacturer who wants his CPA firm to be the first call instead of the last resort.

They come first, and the reason has nothing to do with their size. Nothing after them works without them.

Innovators. The Intellectual Competitor. These are the people in your market who've built a reputation on making smart calls early, and whose decision psychology is *my reputation depends on being right.* They take calculated risks that improve their standing, and they want credit for the discovery.

The managing partner known in her practice area for spotting emerging specialists before anybody else does. The CFO whose peer group respects the quality of his outside advisors.

They need to know an Anchor is already in. Give them the technical validation and the story that lets them claim they found you.

Early Adopters. The Validation Seeker. Sophisticated, competitive on judgment rather than on speed. They're not trying to be first, they're trying to be right early, and that requires evidence that a respected first mover has already committed.

The general counsel who watches which firms other general counsel are selecting. The COO who waits for one or two credible peers before moving.

The target across Innovators and Early Adopters combined is three to five clients whose names do work in a room you're not in.

Early Mainstream. The Defensible Decision-Maker, and this is where a practice becomes a business. Achievement-oriented, careful, career built on well-vetted choices. Decision psychology: *I need to make a choice I can defend.*

You met this person in chapter two, standing in front of the gate with no letter. Their central concern isn't whether you're good. It's what happens to them if this goes badly and someone asks why they picked you.

Being first holds no appeal at all. What they need is confirmation that people they respect have already gone.

Late Mainstream. The Stability Seeker. Security-focused, conservative, motivated by avoiding loss rather than capturing gain, and moved primarily by the cost of continuing to sit still. Decision psychology: *I cannot afford to be wrong.*

The senior partner who moves when peer firms have reached consensus. The CFO at a family business who's used the same accountants for twenty years and needs a heavy, evidence-laden reason to reconsider.

An accounting firm I worked with was getting nowhere with this segment until we removed the word innovation from every piece of material aimed at them and replaced it with stability and consensus. Same firm, same service, same people. The word was the barrier.

The Mistake I Made With It

I told you in chapter two about the firm that went quiet on me after months of work, and about the two reasons I got, one to my face and one behind my back.

There's a third thing in that story and it belongs here, because it's the part where the fault was mine.

They said they wanted to see more momentum.

Read that against this paper. Momentum is what a Defensible Decision-Maker asks for when the Anchor and the Influencers haven't arrived yet. They were reporting their position on the curve, accurately and politely, and I heard it as a brush-off. What they needed was a name they could put in a sentence in a meeting I wouldn't be attending. I didn't have one to give them, because I hadn't done the first phase.

I approached Early Mainstream with nothing behind me and then felt wronged when it didn't work.

That's the sequence failure I've spent three decades telling clients to avoid, run on my own business, by me, while writing the chapter that explains it. Experience doesn't prevent mistakes. It only makes the expensive ones harder to explain.

The Domino

The sequence isn't a preference. It's the mechanism.

Each segment requires validation from the one before it, which means approaching them out of order fails in a way that costs you the relationship afterward. Clean failure would be preferable.

Take a Defensible Decision-Maker before you have Anchor and Influencer commitments and you'll get what looks like interest. Meetings. Requests for material. A contact who takes your calls. What you'll never get is a decision, because the thing they need doesn't exist yet, and by the time it does, they've filed you under a firm they already evaluated.

Approach a Stability Seeker early and it's worse. You'll be permanently categorized as too new or too risky, and that category is remarkably difficult to escape, because nothing in that person's decision psychology is built to revisit a conclusion.

Run the sequence in order and each commitment makes the next one cheaper. That's the whole return on the discipline. Not more outreach. Fewer conversations, in the right order, each one carrying the weight of the ones before it.

Which is Ryan and Gross again. The salesman generated the knowledge. The neighbor generated the decision. If you're the salesman and you have no neighbors yet, you're going to spend five years being right.

Laggards

Every prospect universe contains people who will never buy from anyone.

Extreme risk aversion, decision paralysis, an evaluation process with no terminal state. They've been monitoring your firm for three years. They always need one more piece of information. The objections multiply instead of resolving.

These aren't a sequencing problem. They're a resource allocation problem, and the discipline is identifying them early enough to stop.

The signature is legible if you'll look at it. Consistent engagement with no advancement. Content downloaded, webinars attended, emails answered promptly and pleasantly, and never once a request for a next step or an introduction to a second stakeholder. That last one is the tell. A real buyer eventually brings someone else into the conversation, because real buyers don't decide alone. Someone who's been engaging for two years and has never introduced you to a colleague isn't buying. They're reading.

Every hour spent on a confirmed Laggard is an hour not spent on someone who can commit. Deciding to stop is itself a business development strategy, and it's the one nobody puts in the plan because it doesn't look like effort.

When the Segment Is the Whole Industry

One complication before this closes, because the adoption curve doesn't only describe individuals.

Thomson Reuters, in its 2026 Future of Professionals work, surveyed 736 law firm professionals and 203 corporate legal departments. Seventy-seven percent of legal clients said they want AI-enabled quality from their outside firms. Five percent report receiving it. Thirty-two percent said they're reconsidering firm relationships over it.

Now the other one. The American Institute of Architects surveyed its membership electronically in June and July of 2024, sending to 10,000 randomly selected contacts and getting 541 completed responses. Six percent of the profession reported using AI regularly in their work. Another 53 percent had experimented and not adopted. Eight percent of firms had implemented anything.

Those two industries are on completely different points of the same curve, and it cuts both ways.

If you’re a law firm, your clients are Early Mainstream on this question and you’re Late Mainstream, which is a gap that shows up as thirty-two percent of them shopping.

If you’re an architecture firm, being visibly AI-forward with a client base that’s six percent adopted is a way to sound like you’ve lost the plot. The same message, in the same week, sent to two different industries, is either overdue or premature.

I’d note the AIA numbers were fielded in mid-2024 and I’d expect them to have moved. I’d also expect them to have moved less than you think, because professions don’t turn quickly and the ones with liability attached turn slowest of all.

Five Years Early

Nobody in Greene County was uninformed. Nobody was hard to reach. They had the information for five years before most of them acted on it, and what finally moved them was the field next door.

Somewhere in your market right now is a prospect who knows exactly who you are, thinks well of you, and isn’t going to call.

The message isn’t wrong. The person might be right. It’s the week that’s off, and the only thing that fixes the week is somebody they trust getting there first.

Which is why the sequence starts with a client who doesn’t need anyone’s permission, and why the firms that skip that step spend years being early.