

CHAOS

**THE MARKETING PROBLEM
NO ONE WANTS TO ADMIT**

“In chaotic times, distraction is inevitable. Our audiences are often rightly busy coping with the day to day and marketers need to remember and plan for the reality of challenging times. That’s not just about pragmatism or even stoicism. It demands a discipline that we’re clearer, more relevant to our role and usefulness in facing their challenges and that we communicate through the confusion with consistency, clarity, and distinctiveness... and I’d add a good serving of grown-up humanity and credibility.”

Jennifer Shaw-Sweet, Global Lead, The B2B Institute at LinkedIn

Background

Half a decade gone in the blink of an eye, from Covid to geopolitical rollercoasters, and now...

...with barely enough time to take a breath, we're expected to transform marketing around buying groups, remove a decade of legacy sales models, overcome years of under-investment in brand, optimise for GenAI search, and position solutions as 'AI-enabled platforms'.

Marketing didn't change all at once. But it did change fast. So how did it get so chaotic? What's the impact, both business and personal? And how are leaders charting a path to coherence?

Ironically, the very things we've relied on to answer questions like these in the past have compounded the problems we face today: more tools, more tech, more data. That means more complexity, more chaos, and more confusion about what works.

Understandably, most marketers say their working environment is chaotic. People are feeling the effects of that chaos at home as well as at work: burnout, fatigue, and heightened levels of stress.

This is leading to longer hours, fewer breaks, and increased stress. No wonder almost three-quarters of marketers we spoke to said they're not sleeping properly.

All this chaos isn't just impacting people. It's impacting business performance, too. In fact, **one in three marketers say chaos is resulting in missed opportunities, stalled deals, and inconsistent quality of work.**

But there is a way forward: **coherence.**

By replacing random acts of marketing with coherent operating models, marketers will see stronger alignment with business goals, more consistent quality of work, and reduced stress, leading to a more productive workforce.

For buyers, our research found that almost all notice a positive difference when vendors operate coherently. Coherence improves trust, efficiency, and decision making; these are increasingly important attributes in today's buying landscape.

Summary

Against the sector backdrop of complexity and fragmentation, tmp commissioned research and sourced insights from over 50 CMOs and marketing leaders, to understand the realities facing both B2B marketers and tech buyers.

Drawing on insights from 1,000 respondents across the UK and US, the research explores how chaos manifests itself in organisations, what drives it, and how it affects decision making and employee wellbeing.

This white paper offers a practical framework for navigating the shift from chaotic to coherent marketing, helping brands build trust, reduce friction, and create value in a crowded tech landscape. The insights from marketers and tech buyers show a sector grappling with chaos, but also point to a clear path forward through coherence, trust, and alignment.

Section 1

**DON'T BLAME
BAD LUCK.
BLAME BROKEN
MODELS.**

Right now, marketing leaders are wasting millions, losing deals, and burning credibility. They aren't bad at their jobs; the system is broken.

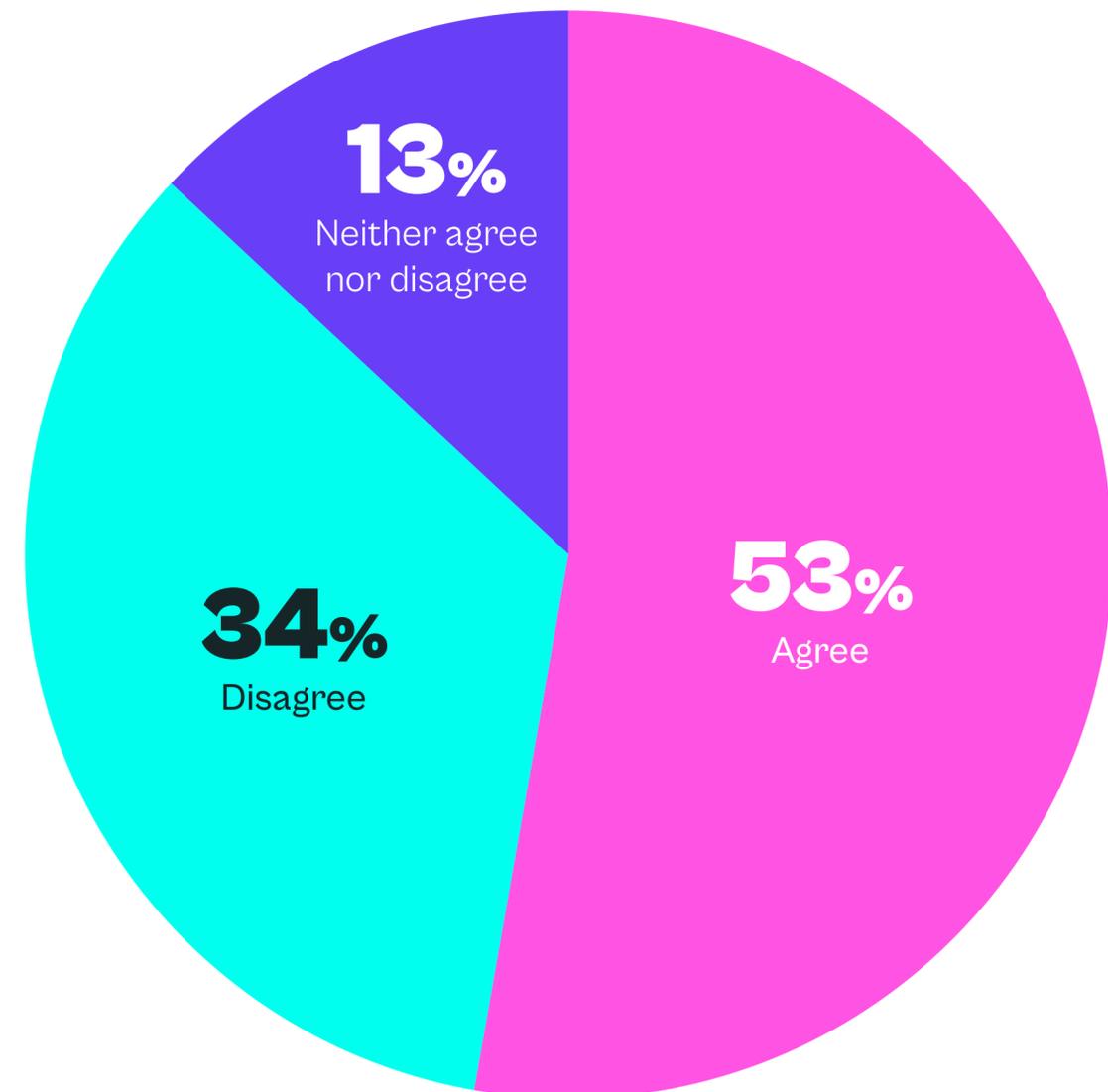
So, what is the impact for marketers? Not only are they losing 15% of potential revenue but the sales cycle is 30% longer (Forrester¹) and customer acquisition costs are 36% higher (McKinsey²).

Whether it's unguided marketing, siloed teams, or service-level metrics, the research shows 53% of marketers agree their work environment feels chaotic. The research shows that the majority of marketers (53%) agree their work environment feels chaotic. This is significant, given the scale and complexity of modern marketing functions.

This sentiment is echoed by Claire-Louise Green, Vice President of Marketing at Adobe EMEA, around the level of chaos the marketing sector is facing:

“At Adobe, personalisation at scale is a very strong focus point for us. And there is a lot of conversation around how to serve that up with speed, efficiency, and return on investment. The big topics. The amount of content you need to produce to the different audiences is getting prolific.”

To what extent do you agree or disagree with the following statement?
“My work environment feels ‘chaotic’ today.”



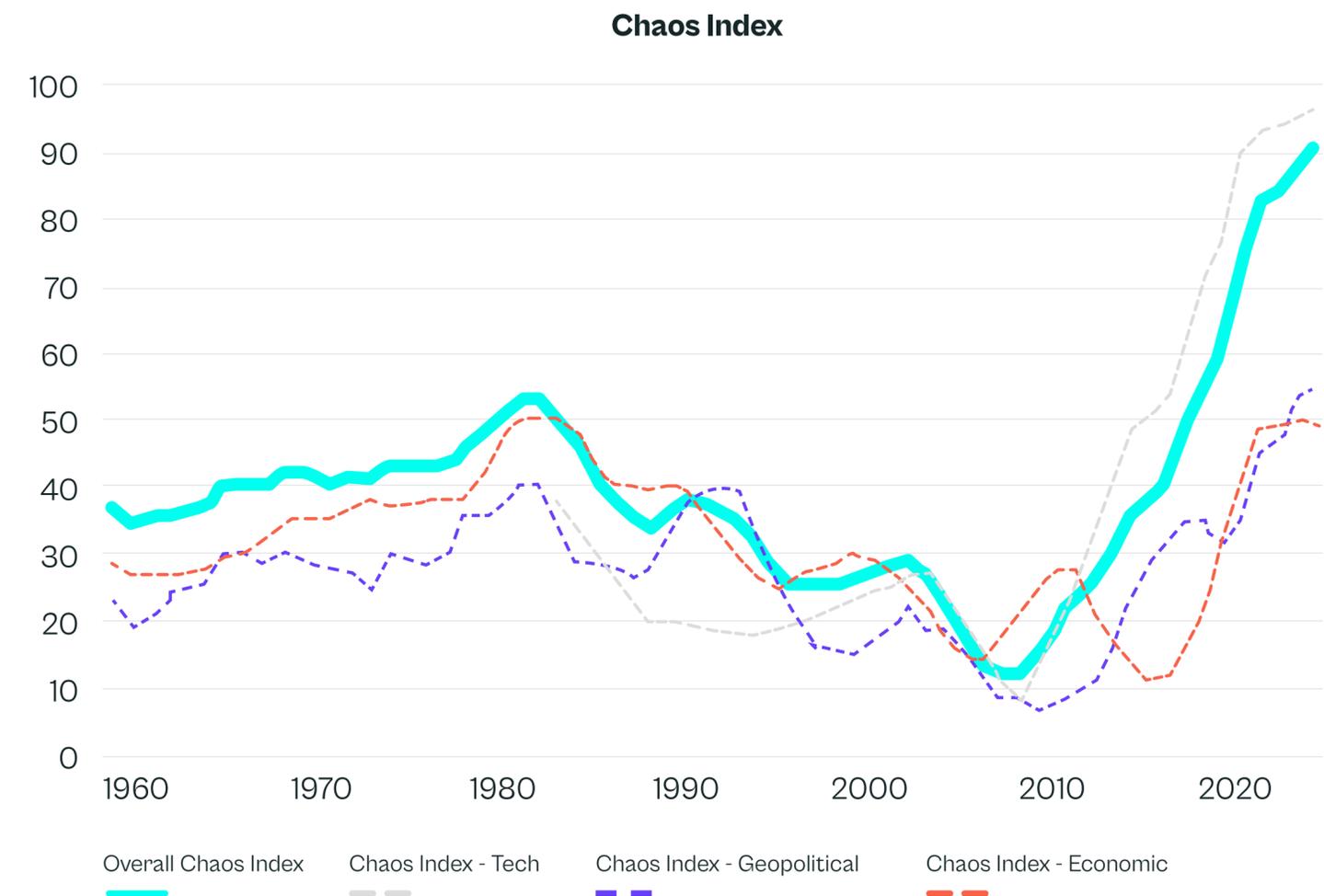
What's driving chaos?

B2B marketing didn't collapse into chaos overnight. Complexity has been building for years, accelerated by global shocks, buyer evolution, and internal inertia.

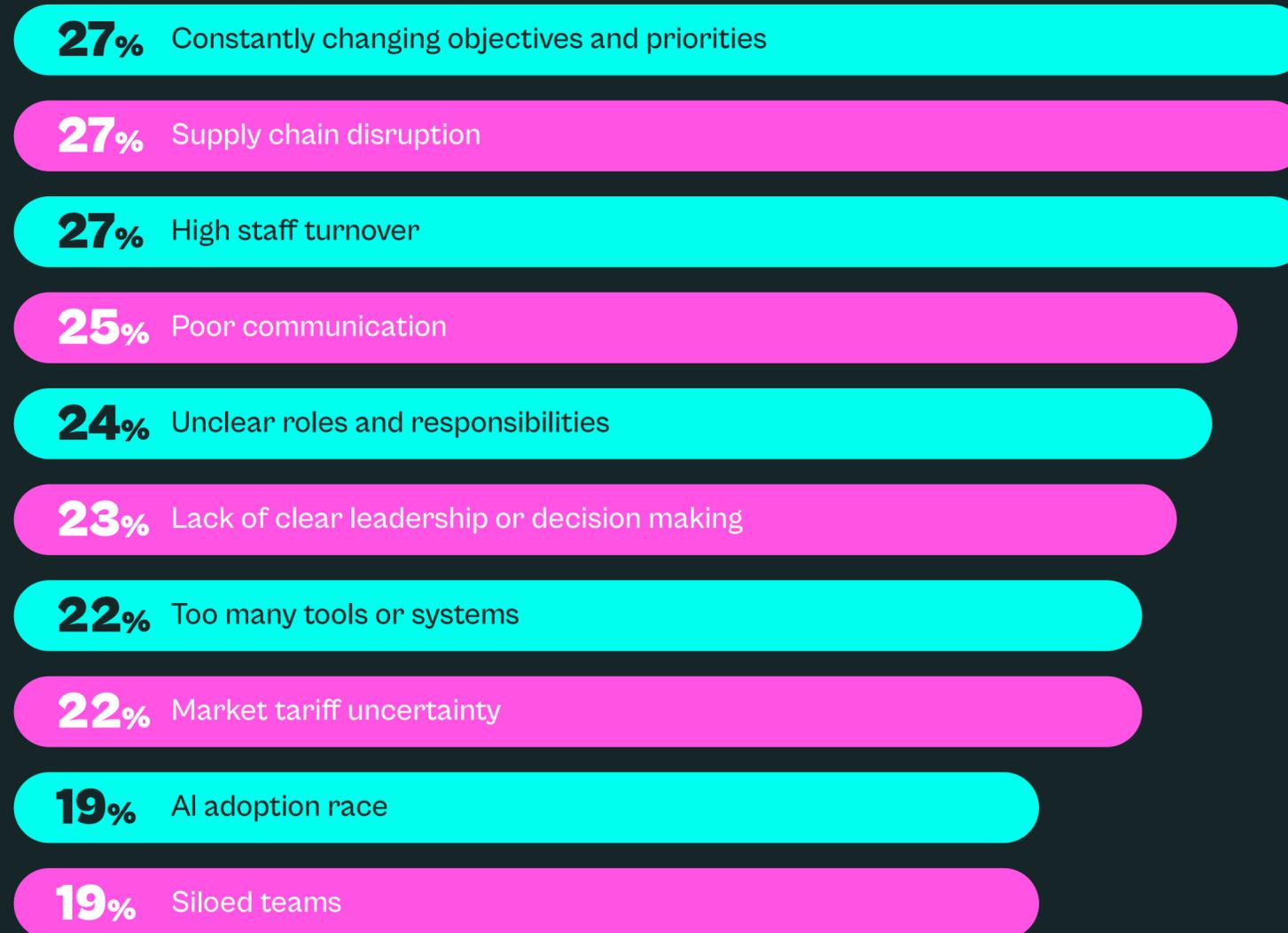
Chaos in marketing isn't sporadic, it's the default context. Geopolitical instability is driving volatile budgets, economic uncertainty is forcing CFOs to squeeze every cent, or AI disruption is rewriting the rules overnight (Forrester, Gartner, 6Sense, Deloitte). These external pressures have been building for some time.

But internal challenges have also muddied the waters for marketers. Data silos blocking a single customer view, teams running in parallel instead of in sync, and measurement gaps leaving marketing's value unproven have all culminated in chaos. The bottom line? The world's moved on, but operating models haven't.

External disruption is unavoidable.
Internal chaos is optional. And preventable.



Which of these factors contribute most to your sense of chaos?



The result



The hard cost of chaos on the business

Our data shows that chaos is impacting business performance, with missed opportunities (32%), stalled deals (29%) and inconsistent quality of work (33%) all cited by approximately one in three marketers.

In terms of wider business impact, Gartner discloses that 77% of B2B buyers describe their most recent purchase as “very complex or difficult” (Gartner³) and 80% experience some form of post-purchase regret (Gartner⁴). Insight from The B2B Institute reveals the biggest problem is agreeing on a decision, as more than 40% said deals get stuck due to lack of consensus⁵. All of this translates to lost revenue, slower growth, and negative influence on consumer trust.

How do you experience chaos?



The cost to wellbeing cuts deep

The effects of chaos aren't just operational; they impact teams emotionally. Stress and fatigue dominate the landscape for marketers.

In the US, 40% say chaos is causing burnout or fatigue. Meanwhile in the UK, over a third of respondents (34%) cite heightened stress as a consequence of chaos.

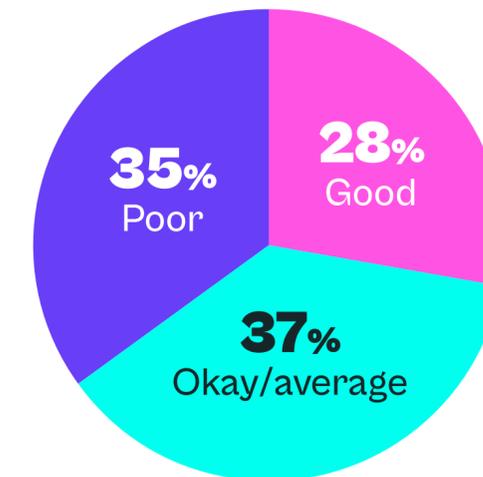
And the coping mechanisms tell their own story. Marketers are working extra hours (38%), missing breaks (39%), and deprioritising long-term activities (34%). These behaviours point to a culture of overwork and focus on the short term, with little time for reflection or strategic planning for incoming priorities.

How are you responding to chaos across the organisation?



Chaos impacts wellbeing too. Over a third of marketers (35%) rate their quality of sleep as poor. Sleep deprivation has serious fallout, affecting creativity, decision making and resilience, which are all critical for success.

How do you rate your quality of sleep?



The human cost of chaos is not just an HR concern; it's a strategic risk. In a sector where agility and creativity drive growth, chaos undermines both performance and culture.

Section 2

WHEN CHAOS BECOMES THE OPERATING MODEL

Chaos is not confined to people. It also affects processes and creates a misaligned environment.

A clear disconnect across processes and teams

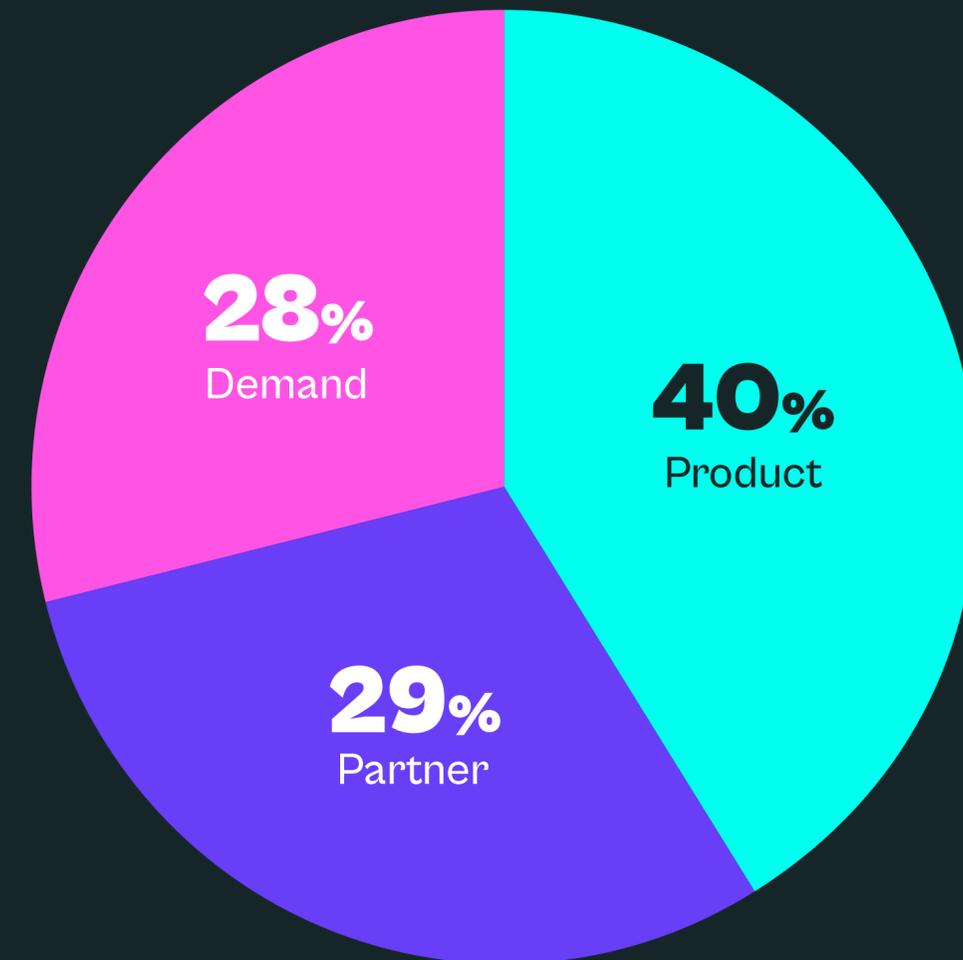
Marketers identified product, partner, and demand as some of the most disconnected areas, suggesting that fragmentation isn't isolated but is embedded across the entire marketing function.

Product leads the way as the most disconnected of the three (40%). This is particularly concerning given the impact of AI on product development cycles. It also suggests strategy and messaging are misaligned, leading to confusion when going to market.

“Product, Sales and Marketing must be a one-headed dragon”

Anna Griffin, CMO, Commvault

Which of these areas feel most disconnected?



Navigating the buying decision

The chaos marketers experience is mirrored in the buying process. Research from⁶ Gartner and⁷ Forrester found that every deal now averages 11+ stakeholders, often with competing incentives. Enterprise B2B buying is hard.

Our research also reveals that more than one in three buyers (33%) mentioned “too many decision-makers involved” as a barrier to buying. This suggests that the number of stakeholders involved in the buying process could be contributing to the level of chaos, making the decision phase less straightforward.

As complexity grows, so does the pressure to deliver clarity and consistency at every touchpoint.

Internal fragmentation of brands compounds the problem: 38% of buyers say it reduces trust, makes comparisons harder (33%), and causes hesitation or delays in purchase decisions (31%).

Research from The B2B Institute on the decision drivers for buyer groups found that 62% would reject a lesser-known brand if faced with similar products at similar prices⁸. This reinforces the importance of having clear, coherent external communications to nurture and maintain brand awareness.

Buying groups comprise people from different disciplines across a target account. If those separate audiences are receiving incoherent, fragmented messaging about your brand, how will they ever reach a positive consensus about you?

Consistency builds awareness and trust.

What’s making the buying process harder?

34% Too much content to sort through

33% Too many decision-makers involved

33% Lack of trust or credibility in vendors

31% Vendor messaging is unclear or inconsistent

“We started to shape a story and a value proposition that made sense whether you were the CEO of a customer company or somebody working in security or IT Ops. That was super important because that meant we could tell one story, we could lean in, and it could also be simple.”

Claire Hockin, SVP & CMO, Splunk

Where trust can be won

Showing up as a coherent brand builds trust. The challenge is that many of the channels that buyers trust aren't owned channels.

Buyers have the need for speed.
And customisation. And transparency. And true collaboration.

It's not just about coherence across channels and content. It's about behaving in a way that makes buying easier, too. Buyers have the need for speed, customisation, transparency, and true collaboration.

“Buyability is the shift from optics to outcomes: reach the whole buyer group, amplify trust through peer advocacy, and instrument measurement to the signals that move pipeline so complex decisions feel aligned, defensible, and easy to say ‘yes’ to.”

David Walsh, EMEA Customer Insights Director at LinkedIn

Which channels do you trust most?

18% Professional associations and communities

13% Industry conferences and trade shows

12% Vendor websites and product pages

12% Tech blogs and news sites

What makes you feel most connected with suppliers?

UK top three:

46% Transparent communication

42% Fast response times

40% Collaborative approach to problem solving

Section 3

MEASURING IMPACT AND LOOKING TO THE FUTURE

Exploring the impact of AI, how marketing will measure success as the industry continues to evolve, and the steps needed to move from chaos to coherence.

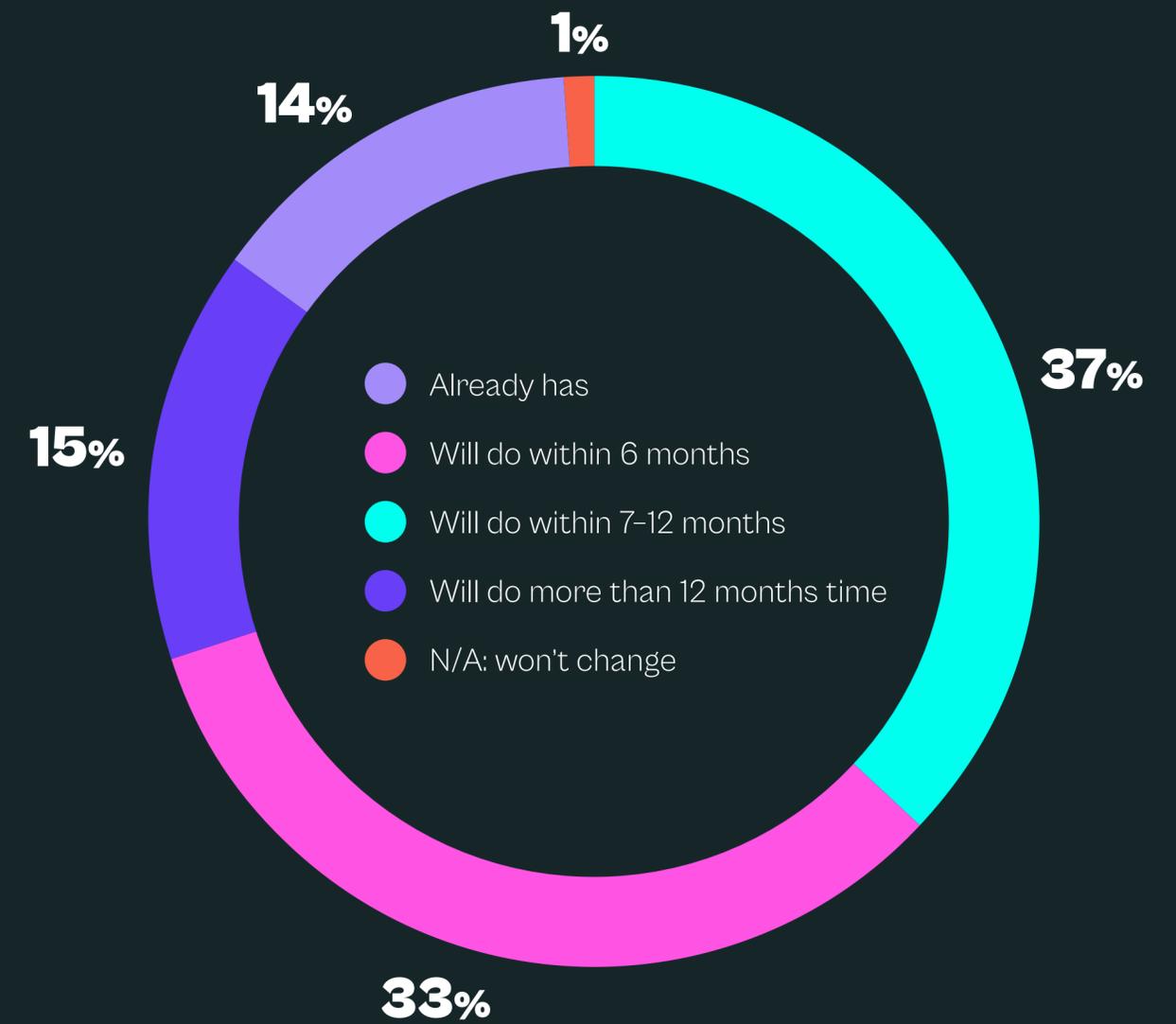
AI as a catalyst for change

GenAI is transforming the buying process and marketing operations. 97% of buyers say AI tools already influence decisions, with a considerable number (44%) describing the impact as major.

For marketers, AI is driving structural change, and the large majority (70%) expect team restructuring in less than a year. Only 1% believe their structure will remain unchanged, highlighting the widespread anticipation of transformation in marketing functions. Despite all the hype, only very limited change has happened so far.

AI promises speed and scale, but it also raises questions about coherence and trust. Agents can't replace human connection. Creating more content, faster, doesn't make buying easier. Marketers must ensure technology enhances, rather than erodes, the buyer experience.

Is AI changing your marketing team structure?



The impact of marketing

Marketing's role in driving growth is widely recognised, but confidence varies.

Less than half of respondents (46%) say marketing has a significant impact on revenue growth, while just over a third (36%) say it is only having a 'moderate' or 'limited' effect. This perception gap underscores the pressure on marketing teams to prove value beyond campaign metrics and demonstrate tangible business outcomes.

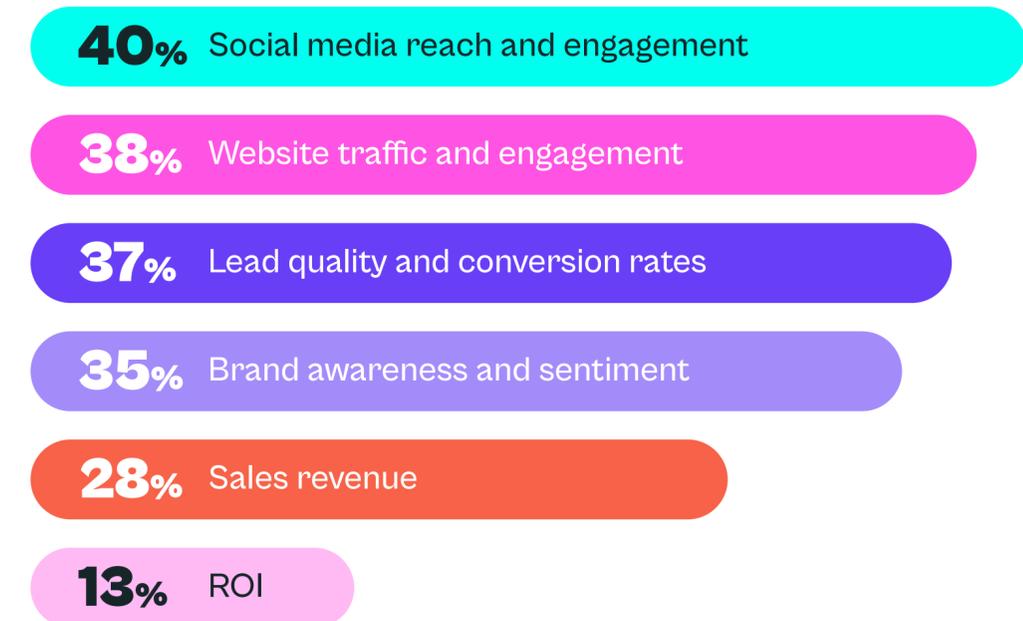
Tricia Stinton, Chief Marketing Officer of Cloud Infrastructure Services at Capgemini, explains how CMOs can demonstrate the value of marketing:

“Ultimately the goal is around driving demand, it’s not all about MQLs but has the activity contributed to the pipeline in some meaningful way? For me, that’s the ultimate marker in terms of success. There are lots of different metrics but part of your role as a CMO is to educate the business on why some of those softer metrics are also important because they tell the story of what leads up to revenue and driving that outcome.”

When we consider which metrics matter most for proving impact, it appears that marketers and buyers aren't speaking the same language. Many marketers cited social media reach and engagement (40%), website traffic (38%), and lead quality and conversion rates (37%) as their most important metrics. While these numbers are clearly important, there is a lack of acknowledgement of other important metrics such as brand awareness (35%) or ROI (13%).

It seems that while marketers chase visibility, buyers want cost savings and clarity. The gap between these feeds into a chaotic environment.

Which marketing metrics do you rely on most to prove impact?



Section 4

THE JOURNEY TO COHERENCE

The journey to coherence

When internal teams, strategy, media, data, and creative move as one, there are up to 20% more opportunities from existing customers, 15% more from hidden buyers, and a 50% jump in sales efficiency⁹.

With fewer random acts of marketing and more impact across the customer journey, that equates to a 2.5x revenue impact from data-driven operational models¹⁰ and more than 10% annual market share growth for best-in-class omnichannel B2B brands (McKinsey¹¹). Plus, the research also reveals nearly all buyers notice a positive difference when vendors operate coherently (97%) as it improves trust, efficiency, and decision making.

For marketers, it clearly delivers internal benefits too, with respondents revealing stronger alignment with business goals (40%), more consistent quality of work (38%), and reduced stress for teams (37%). Given that a significant number of marketers (35%) are either unsure or see marketing, sales, and partners operating in silos, it suggests coherence remains an aspirational target for many organisations.

What comes to mind when you think of a coherent marketing team?

Top three:

40% Stronger alignment with business goals

38% More consistent quality of work

37% Reduced stress for teams

Alignment of marketing activities to business goals (41%), structured regular reporting (42%), and collaboration across agency teams (37%) are seen as the most impactful practices for clients. These practices are associated with improved outcomes and stronger client relationships. Coherence improves trust, efficiency, and decision making for marketers and buyers.

97%
**of buyers notice a positive difference
when vendors operate coherently.**

Chaos is undermining marketing effectiveness and wellbeing

The research reveals that over half of marketers describe their working environment as chaotic, with this chaos leading to missed opportunities, stalled deals, and inconsistent quality of work.

These pressures are not only operational but also deeply affect individual wellbeing. Marketers experience burnout, fatigue, and for 72% of them, poor or only average sleep quality.

Fragmentation across teams and processes is a core driver of chaos

Disconnection is embedded across the marketing function, particularly in areas such as product, partner, and demand.

This fragmentation results in misaligned strategies, unclear messaging, and a lack of trust both internally and externally. Buyers also report that too many decision makers, inconsistent vendor messaging, and lack of trust are major barriers in the buying process.

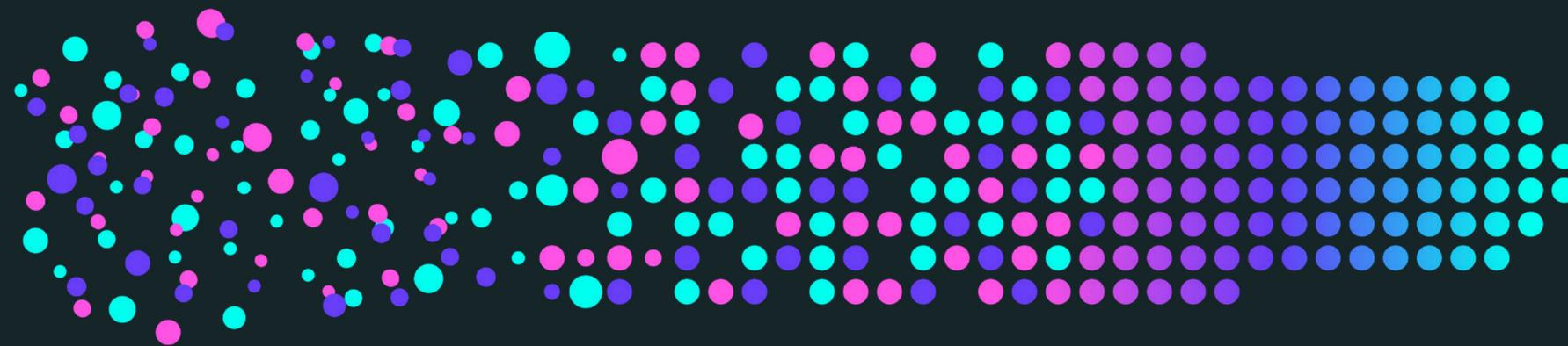
Coherence and alignment offer a clear path forward

Nearly all buyers notice a positive difference when vendors operate coherently, citing improvements in trust, efficiency, and decision making.

For marketers, adopting data-driven operating models and aligning activities with business goals are associated with stronger business outcomes, more consistent quality of work, and reduced stress. The adoption of AI and coherent practices is seen as a catalyst for positive change, but technology must enhance, not replace, clarity and human connection.

Chaos isn't temporary. It's the reality for marketers fighting siloed teams, random acts of marketing, and invisible ROI. But coherence isn't impossible. It's what happens when you align the right skills, break down silos, and put marketing, sales, and product on the same page.

Chaos



Coherence

Section 5

THE RESULTS SPEAK FOR THEMSELVES

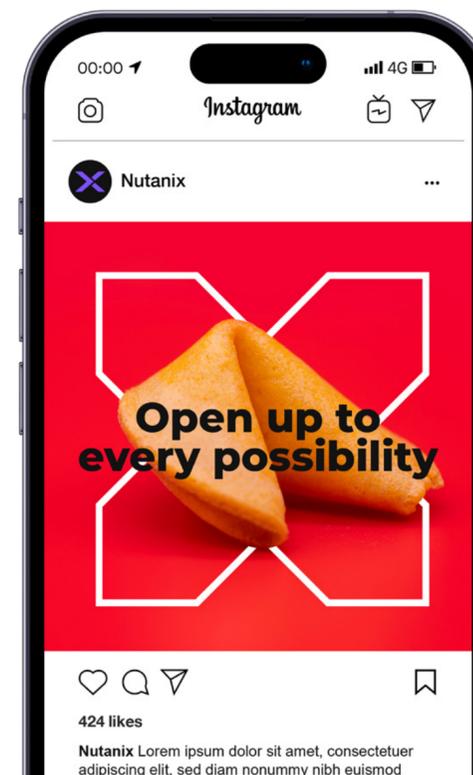
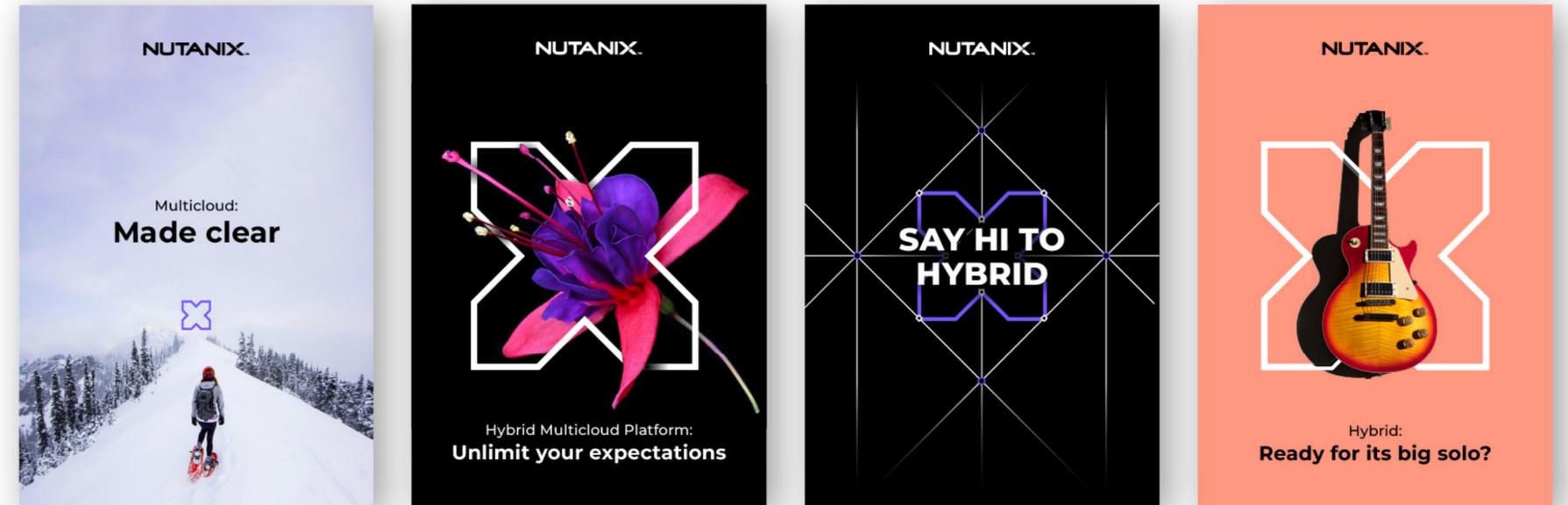
The journey from chaos to coherence isn't just possible, it's proven. The evidence is clear: when teams align, marketing delivers. The challenge now is to embed these practices, sustain coherence, and keep raising the bar.

NUTANIX

Nutanix **doubled** its market cap by uniting every skill under one roof.

“Branding, done well, takes bravery. We weren’t afraid to dig deeper and take risks in the pursuit of our goals, and I’m hugely proud of what my team and tmp have achieved together. Our new brand identity is already yielding tangible results in building brand awareness and is the ideal springboard for our future success.”

Annie Headley
VP, Corporate Marketing at Nutanix





An end-to-end channel marketing engine that drove a **3x increase in partner-generated revenue.**

“I’m blown away by the channel marketing engine we’ve built at T-Mobile for Business within a year—both in terms of the commercial impact on our business right now and the platform it represents for future growth.”

Leslie Gipple,
Senior Segment Manager, Channel Partner Marketing at T-Mobile for Business

POWER GROWTH IN UNEXPECTED PLACES

You've made your footprint in the industry—but now is the time to grow beyond. And, with T-Mobile for Business and the nation's largest and fastest 5G network, your customers' path to nationwide scale starts with you.

FIND SUPPORT THAT GOES BEYOND

Your customers are going places. And with dedicated 24/7 support for their journeys and yours, T-Mobile for Business is the partner that holds up—anywhere.

POWER TRANSFORMATION WITH T-MOBILE FOR BUSINESS INTERNET

POWER CONNECTIONS THAT GO BEYOND.

Seamlessly scale businesses with America's largest and fastest 5G network.

WIN CUSTOMERS WITH SUPPORT THAT GOES BEYOND

POWER TRANSFORMATION WITH T-MOBILE FOR BUSINESS INTERNET

Deliver lasting value to enterprise business customers

Help customers achieve their big goals

Featured hardware partner

Join our 5G business internet partners

Power transformation with T-Mobile for Business internet

RELTIO

Reltio saw a **20% increase in pipeline** by focusing media strategy on the buying group.

“tmp has been integral in helping to lead Reltio into a new frontier of ABX across our GTM function; increasing efficiency, growing awareness, and ultimately building pipeline.”

Karim Azar
Senior Director Web & Digital
Marketing, Reltio

20%

Increase in actionable sales pipeline

24%

Increase in pipeline velocity

50%

Reduction in closed-lost opps

20%

Increase in pipeline per BDR year on year

10%

Increase in pipeline quality

Research methodology

The research was conducted by Censuswide, using a sample of 1,001 Marketing leaders and Tech Buyers (50/50 split). The data was collected 22.09.2025–02.10.2025. Censuswide abides by and employs members of the Market Research Society and follows the MRS code of conduct and ESOMAR principles. Censuswide is also a member of the British Polling Council.

References

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3. <https://www.gartner.com/en/sales/insights/b2b-buying-journey>
4. <https://www.gartner.com/en/articles/tech-buying-regrets>
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Coherence and alignment offer a clear path forward.

With tmp.roi, we can help you predict, measure, and prove marketing's value. Our proprietary insights and diagnostics tool answers three big questions:

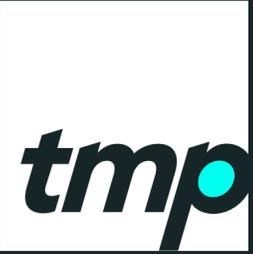
- Where should you invest, and what's the potential ROI?
- How much should you invest?
- How can you optimise campaigns to maximise value?

To book an initial consultation, drop us a message.

Email us today

The collage features several key dashboard elements:

- Chaos or Coherence?**: A screen with a network diagram and labels for CHAOS, CONNECTED, and COHERENCE.
- Performance score**: A gauge showing a score of 63.
- Brand-to-Demand platform (category narrative, distinctive creative, always-on orchestration)**: A recommendation card with text: "You rate brand strength as strong (4/5) and want to create a new category. Market grows -6-10% but your target is 11-20% - you must take share. With 97% of buyers checking your site and only -5-30% in-market at any time building memory and early preference lifts win rate across long enterprise cycles." It also lists "Potential KPI improvements" (+3 percentage points win-rate across opportunities; stronger unaided awareness and shortlist inclusion; improved deal velocity and CFO readiness) and "Potential ROI" (\$64,285,714 in-year incremental revenue from +3pp win-rate via brand-to-demand (category narrative, distinctiveness, CFO-proof value messaging)).
- Buyer enablement content (CFO pack, ROI calculator, proof library, on-demand webinars)**: A recommendation card with text: "Content is strong (4/5) - now weaponise it for enterprise diligence. With 6-8 stakeholder committees and CFO on most deals, more proof reduces stall-outs and CF Webinars and guides drive mid/late-stage mo proof and ROI tools close the gap." It lists "Potential KPI improvements" (+6% pipeline lift, +4% conversion and Fe) and "Potential ROI" (\$1,000,000).
- CURIOSITY SPARKED? WANT TO TAKE YOUR RESULTS FURTHER?**: A form with fields for First name, Last name, Company name, Job title, Email, and Country/Region, with a "Sign me up!" button.
- HOW YOU COMPARE ACROSS KEY B2B MARKETING THEMES**: A screen titled "Your responses vs. Category benchmark" with a radar chart comparing metrics like Sales marketing product alignment, Digital experience, Data quality, Content & assets, Market research, and Business strategy.



WANT TO FIND COHERENCE IN THE CHAOS? LET'S GET IT TOGETHER

Talk to us