

YOUR **2026** MID-YEAR **MARKETING** **ASSESSMENT**





THE ASSESSMENT

You're already three months into 2026.
How is it going?

In our annual **B2B Marketing Benchmark Report**, marketers told us where they're investing, what's working, and where they're struggling.

From that, we've compiled a checklist that turns those insights into nine key areas you can score yourself against.

This will allow you to check in, see where you stack up, identify your gaps, and focus your energy where it matters most in the second half of the year.

Directions: Fill this out as honestly as possible, add up your points, and use the graph to see where you stand for the year.



NOTES

BUDGET AND STRATEGY



We revisited and adjusted our 2026 budget allocation based on Q1 performance data, not just our original plan.



Our marketing objectives remain directly aligned with the overall business goals.



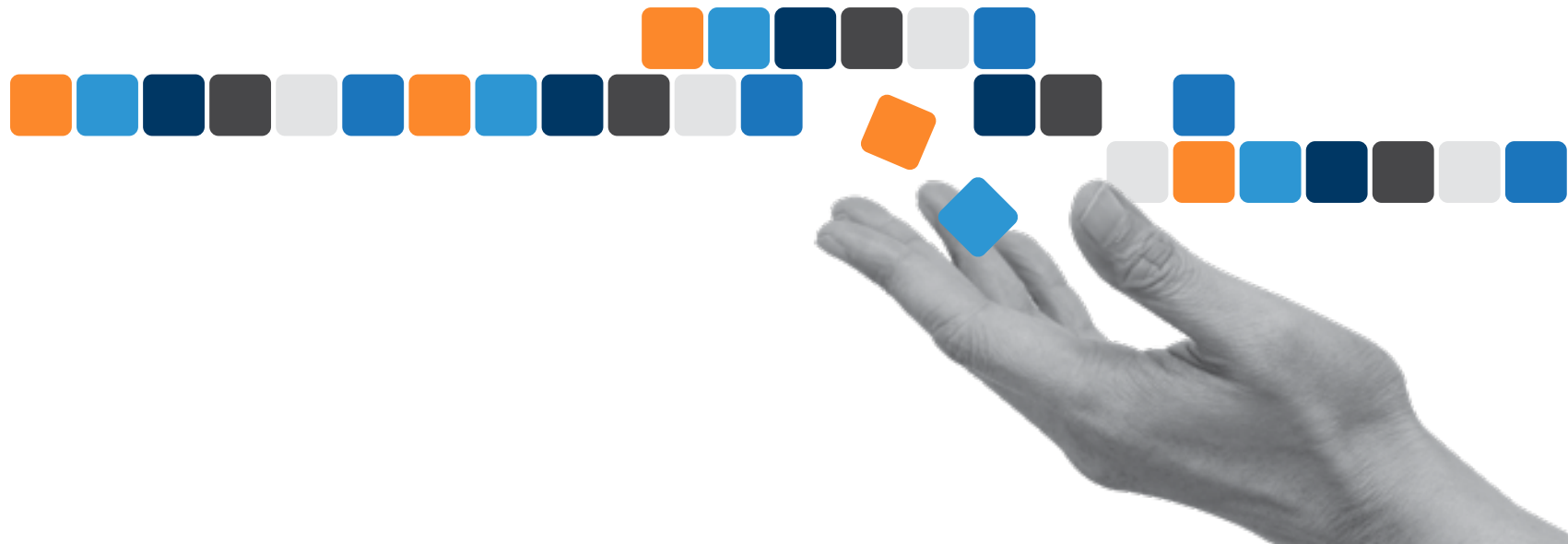
We have ongoing buy-in from executive leadership on marketing's strategic priorities and regularly communicate progress.



We've established clear success metrics for each major budget category and are tracking against them.



We've protected at least one-third of our budget for brand awareness and thought leadership, not just demand.



DIGITAL ADVERTISING**NOTES**☐

We have clear goals and measurement criteria tied to the pipeline, not just impressions.

☐

We review paid media performance monthly and reallocate spend based on channel ROI.

☐

We test and optimize creative, targeting, and messaging on a regular cadence.

☐

We coordinate digital advertising with content, email, and event campaigns for integrated impact.

LEAD GENERATION**NOTES**☐

We have documented lead qualification criteria and scoring models.

☐

We track leads from MQL through to revenue attribution.

☐

We conduct regular lead quality reviews with sales teams.

☐

We have a diversified lead-generation strategy across multiple channels (email, events, content, paid, and social).

☐

We intentionally connect channels (e.g., email, content, and events) in integrated campaigns instead of running them in silos.

AI INTEGRATION

NOTES

☐

We've identified specific AI use cases tied to our marketing objectives (e.g., content creation, analytics, segmentation).

☐

We have guidelines for when to use AI versus human expertise.

☐

Our team has been trained on the capabilities and limitations of our AI tools.

☐

We're measuring AI's impact on efficiency, quality, and outcomes.

☐

We have activated at least one AI use case beyond content creation, such as analytics, segmentation, or personalization.

☐

We regularly evaluate new AI capabilities and have a plan to scale what's working in the second half of 2026.



EVENT MARKETING

NOTES

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We have strong pre-event marketing strategies to drive the right attendance and engagement.

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We track event ROI from registration through the pipeline and revenue.

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We have documented post-event follow-up processes across marketing and sales.

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Our 2026 event mix balances major trade shows with smaller, targeted executive or roundtable formats.

☐

We intentionally connect channels (e.g., email, content, and events) in integrated campaigns instead of running them in silos.



CONTENT MARKETING

NOTES

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We have a documented content strategy aligned with buyer journey stages and key accounts.

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We're investing in high-performing formats such as webinars, video, and short-form lead gen assets.

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We have a content distribution plan for owned channels (website, email, social).

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We repurpose core content into multiple formats and channels to maximize reach and ROI.

☐

We measure content performance by its impact on engagement, lead quality, and pipeline — and adjust investment accordingly.

☐

We regularly evaluate new AI capabilities and have a plan to scale what's working in the second half of 2026.



RESEARCH AND INTELLIGENCE

NOTES

☐

We use multiple research methodologies (surveys, market trend analysis, competitive analysis, etc.) to provide comprehensive insights.

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We conduct competitive and brand analysis on a regular cadence.

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We continuously track market trends that impact our buyers and offerings.

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We share research insights broadly across marketing, sales, and leadership teams.

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We partner with external research providers when deeper or specialized insight is needed.

MEASUREMENT AND ANALYTICS

NOTES

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We have marketing attribution in place that goes beyond last-touch.

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We track marketing's contribution to pipeline and revenue — not just activity volume.

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We maintain executive dashboards with consistent, trusted metrics.

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We use data and buying signals to inform budget allocation and channel decisions.

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We can clearly articulate marketing ROI and key learnings to leadership.

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We measure beyond lead counts — focusing on quality, influence on deals, and overall ROI.

ORGANIZATIONAL ALIGNMENT

NOTES

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We have regular cross-functional meetings with sales and, where relevant, customer success.

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Marketing and sales share goals and metrics for pipeline, revenue, and key accounts.

☐

We have implemented shared technology platforms and data sources.

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Sales is included in marketing planning processes for campaigns and events.

☐

We have processes to identify and address misalignment quickly.

☐

We intentionally connect channels (e.g., email, content, and events) in integrated campaigns instead of running them in silos.



SCORING AND NEXT STEPS

There are two ways to read your results — use both.

By the numbers: Add up your checked boxes and find your range below.

By section: Where you have the most unchecked boxes is where to start. That's your roadmap for the rest of the year.

29–34: You're ahead of the curve.

You're heading into the second half of the year strong. Try stepping out of your comfort zone by tackling AEO. While most B2B marketers are still catching up, you're in a position to get ahead of it.

[Start here >>](#)

21–28: You're solid, but there's ground to gain.

Let your unchecked boxes point to the gap. Then use the data in the 2026 B2B Benchmark Report to see what top performers are doing in that area, and pick one thing you can implement this month.

[Start here >>](#)

12–20: Time to tighten up the foundation.

Before adding new tactics, get the fundamentals right: alignment, attribution, and a clear content strategy. Use Q3 as your rebuild window; it'll pay off in Q4. After that, focus on the areas with the most unchecked boxes.

0–11: Don't wait.

Your unchecked boxes are your roadmap. Start with the section that has the most gaps and consider bringing in outside expertise, such as EndeavorB2B, to accelerate. The second half is still yours to win.

[Schedule a consultation >>](#)

Get the full report: [\[Download the full 2026 B2B Marketing Benchmark Report >>\]](#)

THE SECOND HALF IS YOURS TO SHAPE.

You've already done something most marketers skip; you stopped to assess. That self-awareness is what separates good marketing from great marketing. Now you have a clear picture of where you stand, where to focus, and what to do next.

Use this as your guide from here to the end of 2026.

Come back to it. Share it with your team.



ABOUT ENDEAVORB2B

At EndeavorB2B, we empower marketers to build meaningful connections, access actionable intelligence, and leverage innovative marketing solutions. Our deep industry expertise and commitment to excellence equip you with the tools and insights to stay ahead in a rapidly evolving marketplace.

We serve marketers across Manufacturing, Construction, Healthcare, Automotive, Energy, Digital Infrastructure, and 16 other B2B sectors. With content-seeking audiences, data-backed insights, and a full suite of customizable solutions, we give you the clarity to understand your customers, the confidence to make smart decisions, and the edge to outpace competitors.

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