



 LIQUID X **Avasta**

# The Strategic CMO Toolkit

Tools to Align Brand, Marketing,  
and Business Strategy in 100 Days

# 100-Day CMO Checklist

A simplified diagnostic to align brand, marketing, and business strategy. Ideal for new CMOs or seasoned leaders resetting momentum.

Phase 1

## Diagnose and Ground

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(Days 1-30)

- Audit data sources for market sizing and segmentation
- Compare internal vs. external insights for consistency
- Analyze category growth: organic vs. switching vs. wallet share
- Map competitor dynamics by region, buyer type, and segment
- Segment customer base by usage or engagement frequency
- Measure brand awareness and association with buyer needs

## Phase 2

# Assess Strategic Fit

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(Days 31–60)

- Review alignment between business and brand value propositions
- Evaluate consistency across agency/partner briefs and messaging
- Identify contradictions or fragmentation in GTM execution
- Estimate average time lag between marketing exposure and purchase
- Complete the Customer Value Leverage Matrix to identify areas where you're winning, leaking value, or underperforming (included in this toolkit)

## Phase 3

# Align and Activate

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(Days 61–100)

- Translate marketing metrics into financial terms
- Align with Finance on brand-driven revenue and opportunity cost
- Assess internal leadership's understanding of brand impact
- Use the Customer Value Leverage Matrix to frame growth opportunities and manage cross-functional expectations
- Summarize key findings and activate a cross-functional roadmap

# Customer Value Leverage Matrix

Where are you leaking value or poised to win?

Use this matrix to determine how to communicate market opportunity and manage expectations within your organization. This tool helps prioritize fast-win activations, surface blind spots, and guide smarter capital allocation decisions.

This exercise is not about precision—it's about surfacing gaps, estimating opportunity, and reframing how your organization sees market momentum. If these numbers are difficult to calculate or establish, it is a major risk to setting and executing on business strategy and capital allocation.

In the table below, estimate what % of your total target market (global, U.S., or other) falls into each cell—Aware of Your Brand, Existing Customers, and Lapsed/Disengaged—for each segment. Use known data or directional assumptions. The Share of Market column should reflect the total % for each row and sum to 100% across all segments.

Customer Segment	Aware of Your Brand	Existing Customers	Lapsed / Disengaged	Share of Market
New to Brand				
Cross-sell / Upsell				
Switchers				
<b>Total</b>				100%

Once complete, use the outputs to:

- Identify where you're overinvested or underperforming
- Prioritize segments for quick-win activation (e.g., known buyers who lapsed)
- Make the case for longer-term investment in low-awareness, high-potential segments
- Align teams around where your brand is winning—and where it's invisible

# Brand and Marketing Truths

## for Strategic CMOs

A curated set of data points validated by companies, academics, and industry research. These are directional benchmarks. The most important insight is understanding how each applies to your company, category, and brand.

When we say “brand,” we’re not just referring to your logo or visual identity—it’s the collective perception of your company from the market’s perspective. While your branding shapes that perception, it doesn’t control it. Put simply: your reputation is what you’re known for; your brand is what people expect next. If it only reflects the past, it can hold you back.

# B2B Insights

## 95/5 Rule

Only 5% of buyers in any B2B category are actively in-market at any given time.

Source: LinkedIn Marketing Solutions, 2024

**Our Take:** Your brand’s ratio depends on replacement cycles, buyer consolidation, and switching frequency. Understanding your category dynamics is essential.

## 70% of the buying cycle happens before any sales interaction.

During this phase, marketing has sole ownership.

Source: 6Sense, 2024

**Our Take:** The influence mix varies significantly by brand recognition. Non-marketing drivers—such as referrals, channel partners, media, and analysts—must be mapped to identify where marketing can amplify influence.

**80–90% of purchases are made from the top 3 vendors on the buyer’s mind —before any outreach.**

Source: HBR & Bain, 2020

**Our Take:** Top-of-mind doesn’t mean biggest. Brand visibility, word-of-mouth, and category fit shape this list. Being easily associated with a clear problem-solution frame is critical.

**6 months:**

Maximum ROI window for demand gen and short-term campaigns

**3 years:**

Minimum horizon for brand investment ROI

Source: Binet & Field, 2013

**Our Take:** Short-term campaigns can activate built-up brand equity—but don’t build it alone. Without brand-building, aggressive demand tactics can erode trust and damage reputation.

**18% of B2B purchase decisions are driven by brand.**

Source: McKinsey, 2017

**Our Take:** Your brand’s ratio depends on replacement cycles, buyer consolidation, and switching frequency. Understanding your category dynamics is essential.

**70% of the buying cycle happens before any sales interaction.**

During this phase, marketing has sole ownership.

Source: 6Sense, 2024

**Our Take:** Brand is the third most important factor—and the only one you fully control. Our experience shows brand influence ranging from 7% to 41%. CMOs must determine their specific brand’s role within category dynamics.

# B2C Insights

**10–20% revenue increase reported by 68% of companies with consistent branding across touchpoints.**

Source: Marq, 2021

**Our Take:** Subliminal brand effects are powerful. Consistency drives recall, familiarity, and trust.

**10–35% of brand perception is driven by marketing activity.**

Source: Nielsen, 2022

**Our Take:** Brand perception has multiple sources—only some are marketing-led. Identifying and shaping these drivers requires deep category and brand-specific insight.

**3–5× more accuracy in identifying purchase drivers by starting with demographic segmentation.**

Source: Liquid x Avasta Challenger Index, 2024

**Our Take:** Primary purchase drivers aren't universal. Generational exposure is still a leading indicator of brand awareness, consideration, and preference—especially in B2C.

# About **the authors**

## Liquid

[www.liquidagency.com](http://www.liquidagency.com)

Liquid Agency is a brand consulting and activation company that empowers ambitious organizations to achieve and maintain category leadership. For over 24 years, Liquid Agency has partnered with leading Consumer and B2B brands such as GE, Hitachi, HP, Intel, Nike, Nordstrom, and Walmart to build momentum through belief-driven alignment of brand, customer, and employee experiences.

## Avasta

[www.avasta.co](http://www.avasta.co)

Avasta is the Profitable Growth Company. We work at the intersection of end-customer insights, financial data analytics, and strategic valuation. We provide an impartial, outside-in market understanding that enables executives and boards to have robust, financially validated strategies that are applied concurrently across their internal functions in strategy, sales, marketing and through our “Winnable Addressable Market (WAM) Intelligence solution. Portfolio companies from half the 10 largest PE firms have benefitted from our expertise as well as privately held companies.