

B2B Sales Acceleration Checklist

B2B selling is complex. Buyers make emotional decisions. There are multiple stakeholders and the journey is fragmented. What's more, you're often trying to hit a moving target.

Rest assured, there is a proven path you can take and it can be accelerated with strategic adoption of AI and an agile posture.

Use this checklist as a thought starter to help set priorities and close gaps.

Insights: Digital Momentum Summit



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Consideration

Business

Digital

AI

Problem Framing & Context

Define the problem in buyer language - not vendor jargon.

Provide role-specific landing pages and content pathways.

Create personas for each role to help direct your content creation.

Accessible, Transparent Information

Clear pricing models, timelines, contractual terms.

Intuitive navigation, searchable specs, real-time availability.

AI content tagging, semantic search, and dynamic FAQs.

Stakeholder Alignment Support

Support established beliefs with ROI, cost/benefit analysis.

Multi-format resources (one-pagers, calculators, videos) to share.

Personalization, product compare and recommendations.

Friction Reduction

Streamlined approval and procurement steps. UX/UI Analysis.

Self-service demos, workflows, human contact options.

Chatbot assistants for tier-1 queries; forms pre-filled.

Confidence & Trust Building

Success evidence, peer benchmarks, compliance assurance.

Visible case studies, testimonials, and proof points in the journey.

RAG-enabled assistants so responses reference verified sources.

Post-Decision Reassurance

Reduce buyer's remorse. Upfront onboarding roadmap.

Portals for progress tracking, training, and ongoing support.

AI nudges for adoption, automated usage analytics, churn alerts.