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GETREV GUIDE · 2026

Winning Before They Show Up.

The early vendor-preference playbook for B2B demand generation.

CONTENTS

What's inside

SECTION 01

Executive summary

The single most important shift in B2B demand generation is not a channel, a tool, or a tactic. It is a change in *when* the decision that matters actually happens.

Forrester's ongoing buyer research finds that **68% of B2B buyers already have a preferred vendor** before they engage with any of the vendors on their consideration list. That preferred vendor wins the deal roughly **80% of the time.**

The implication compounds through every downstream demand-gen investment. If preference is set before the buyer identifies themselves, then MQL routing, intent alerts, form-fill nurture, and BDR cadences — the tools most B2B teams have built their programs around — are all firing after the deal has effectively been decided. Teams are not competing for the deal. They are competing to be the polite second option in shortlists they have already lost.

This guide lays out the operational alternative. It defines the pre-engagement window where preference actually forms. It explains why exegraphics — GetRev's proprietary need-signal data — reach accounts upstream of the intent data everyone else is racing to activate. It shows how AI-search visibility keeps a vendor's point of view present in the exact research surfaces buyers now use during that window. And it lays out the metrics, case pattern, and 90-day roadmap for making the transition.

THE BET AT THE CENTER OF THIS PAPER

The next five years of B2B demand-gen advantage will go to the teams that stop chasing captured intent and start shaping preference before it is set.

SECTION 02

The 68/80 problem

Two numbers should be reorganizing every B2B demand-generation budget in 2026.

68%

of B2B buyers already have a preferred vendor **before** they engage with any vendor on their consideration list. Preference is brought into the sales process, already largely formed.

80%

is the win rate for that preferred vendor. In practical terms, once preference is set, the deal is effectively decided.

Multiply those together and the implication is stark. Roughly half of every B2B deal in your addressable market is being won or lost before any vendor knows the account is in play — and most demand-gen stacks have zero visibility into that window. The tooling economy is built around measurable events: form fills, content clicks, intent surges. Preference formation is not measurable, so the roadmap defaults to what the dashboard can see — and the dashboard cannot see the phase that decides the deal.

EXECUTIVE TAKEAWAY

If your stack fires only on events the buyer knowingly creates — form fills, intent surges, review visits — you are operating downstream of the decision that matters. The question is what to do upstream.

SECTION 03

The pre-engagement window

Modern B2B buying moves through three phases before any vendor knows the account exists.

01
NEED FORMATION

A structural need forms inside the organization. Headcount is added to a stretched function. A leadership change shifts priorities. A tech-stack decision creates a downstream gap. A budget cycle opens. None of it registers in a traditional demand-data feed — but the conditions for a purchase are being created.

02
ANONYMOUS RESEARCH

The buying committee begins researching — increasingly inside AI assistants rather than search engines. Per Walker Sands' 2026 research, **73% of buyers now use AI tools** during purchase research and **51% of B2B software buyers begin inside an AI chatbot.** Committees compare vendors, form a mental shortlist, and develop a preference — and no vendor's dashboard reflects any of it.

03
IDENTIFI-CATION

A form fills. A demo request lands. An MQL is created. The tools most B2B teams pay for finally light up — but by Phase 3, the deal is 80% decided.

The window where preference actually forms is **Phase 2.** It is invisible to conventional demand-generation stacks, and it is the only phase where a vendor can meaningfully influence which of them the buyer decides to prefer.

SECTION 04

Why intent data arrives too late

Intent data is the industry's current best answer to the pre-engagement problem, and it is definitionally an incomplete one. It measures active research signals — topic surges, review-site visits, competitor comparisons, category-relevant content consumption. Every one of these is downstream of preference formation, not upstream of it.

By the time an account is generating enough research activity to register as a surge, the buying committee has already been researching. Which means it has already been forming a preference. Which means, for the majority of surging accounts, one vendor is already ahead. Sending a coordinated outreach sequence into a surge means arriving at the tail end of a process that started weeks earlier.

The economics reflect this — reply rates that decline as more vendors buy the same signals, conversion that concentrates at the accounts where preference had not fully hardened, and pipeline disproportionately made up of the deals where the buyer had not yet decided.

None of this means intent data is worthless. It means intent data answers a different question than the one that matters. It tells you which accounts are *late* in the buying cycle. It does not tell you which accounts are *early* enough to shape preference in the first place. Treating it as a primary demand-generation input, rather than a retargeting and expansion tool, is a misuse of the signal.

EXECUTIVE TAKEAWAY

Intent data is a downstream signal — it captures accounts after preference has begun forming. Reallocating the majority of demand-gen budget to upstream signals is the strategic move.

SECTION 05

Exegraphics: signals upstream of intent

Exegraphics are the operational alternative. They describe how a company is structured and how it has been changing — which functions are growing, where investment is concentrating, which capabilities are maturing, what recent leadership decisions signal about priorities.

FIRMOGRAPHICS	INTENT	EXEGRAPHICS
What a company *is.*	**What it's *searching for.***	**How it's *behaving.***

The critical property is that they fire **earlier** than intent signals. A company that has added three revenue-operations roles in six months and hired a VP of RevOps is telegraphing that an operational need is forming. That signal exists months before anyone types "best RevOps platform" into ChatGPT — a full quarter before anyone visits a review site. It gives a vendor the window that intent data structurally cannot.

50–300%

Across hundreds of GetRev engagements, high-fit accounts identified through exegraphic modeling outperform low-fit accounts by 50 to 300% on close rate and lifetime value — because they are identified **before** they are in-market, precisely the phase where preference can still be shaped.

SECTION 05 · CONTINUED

Five signals that matter most for preference formation

Functional expansion

New hires clustering in a specific function that suggests a maturing capability or a stretched adjacency. Especially predictive when combined with a new leadership hire in the same function.

Leadership change

A new C-level or VP-level executive brings a mandate. Their first 90 days are usually spent taking stock of tooling and process gaps. A high-leverage window.

Tech-stack evolution

A recent adoption, deprecation, or migration in a related category creates a downstream implication for your category — often preceding an active vendor evaluation by one to two quarters.

Investment or budget signal

A funding round, a strategic initiative, a product-line expansion, or a budget cycle. These change the size and urgency of buying decisions.

Structural risk or pressure

Regulatory change, competitive pressure, or capacity stress. Buyers under structural pressure evaluate more urgently than buyers exploring optionally.

Weighted against a vendor's closed-won pattern, these signals produce a rank-ordered list of accounts entering the pre-engagement window — the window where preference is still open.

EXECUTIVE TAKEAWAY

Firmographics tell you what a company is. Intent tells you it is late. Exegraphics tell you it is early — and which structural signals suggest engaging now, before preference forms against you.

SECTION 06

AI visibility: presence where preference forms

Identifying accounts in the pre-engagement window is only half the play. The other half is being present in the surfaces those accounts use when the buying committee begins its anonymous research. In 2026, that surface has changed: B2B buyers are migrating from search engines to AI assistants.

51%
OF SOFTWARE BUYERS BEGIN RESEARCH IN AN AI CHATBOT

73%
OF BUYERS USE AI TOOLS DURING RESEARCH

24:1
AI-SEARCH CONVERSION RATIO VS ORGANIC (AHREFS)

The mechanics differ. AI assistants do not rank links; they synthesize answers. When a committee member asks an AI to compare vendors, the system returns a composed paragraph citing a handful of sources. **Citation is the new ranking.** The vendors whose points of view appear inside the answer influence preference. The vendors who are absent do not.

The overlap between the sources that rank on Google and those cited in AI answers has narrowed sharply — from roughly 70% to under 20% over 18 months, per 2026 GEO industry reports. Ranking on Google no longer guarantees visibility in AI answers, and the second system increasingly determines which preferred vendors buyers walk into their consideration process with.

"Optimizing for AI visibility" is not a content-marketing tactic. It is the operational mechanism through which pre-engagement preference gets set for a growing share of B2B pipeline.

EXECUTIVE TAKEAWAY

Exegraphic targeting identifies the accounts entering the pre-engagement window. AI visibility ensures your point of view is present in the surface those accounts use during that window. Both are required.

SECTION 07

The combined play

Exegraphic targeting plus AI visibility is the current best operational answer to the 68/80 problem. Exegraphic signals surface the accounts entering the pre-engagement window — the ones where a structural need is forming but intent has not yet caught it. AI-search visibility ensures the vendor's point of view is present in the research surface those accounts will use. Multi-channel outreach anchored on the exegraphic signal — email, LinkedIn, syndicated content, named-author thought leadership — reinforces the AI-visible position with human-visible touchpoints during the same window.

The composition of demand-gen activity shifts materially. Traditional programs concentrate spend on captured intent and downstream nurture. Preference-formation programs concentrate spend on upstream signal identification, AI-search visibility, and thought leadership designed to be forwarded internally by buying committees during anonymous research. Intent data does not disappear; it moves into a supporting role — retargeting and expansion, not primary demand generation.

The pipeline that results looks different. Deals arrive with pre-existing preference. Inbound rates from high-fit accounts rise while overall inbound volume may stay flat. Sales cycles compress at the top of the funnel because the buyer has already done the vendor-comparison work with your point of view included. Win rates on identified opportunities climb because the deals that reach identification are disproportionately deals where preference has already been set toward the vendor.

EXECUTIVE TAKEAWAY

The combined play is not additive; it is compounding. Exegraphic targeting without AI visibility means being early but invisible. AI visibility without exegraphic targeting means being visible but untargeted. The advantage sits at the intersection.

SECTION 08

Measuring early preference

Traditional measurement — MQL volume, lead-to-opportunity conversion, cost-per-lead — does not capture preference-formation performance. Four new lines are worth adding to the program.

METRIC 01

Exegraphic-fit pipeline share

Share of active pipeline from accounts modeled as high-fit. Top-quartile programs run above 70%; Level-1 organizations typically below 40%.

METRIC 02

Pre-engagement pipeline share

Share of new pipeline sourced from accounts engaged before they identified themselves. The leading indicator of preference-formation effectiveness.

METRIC 03

Preferred-vendor arrival rate

For deals where the buyer indicates a pre-existing preference, the share where it was toward the vendor. The trailing indicator that matters most.

METRIC 04

AI-search citation rate

How often the vendor's point of view is cited in AI answers for a defined query set. Platforms like Profound, Goodie, and Mersel now standardize this.

The measurement shift is genuinely uncomfortable. It moves the primary KPIs away from top-of-funnel volume and toward composition and quality. But without it, the program cannot demonstrate whether it is winning the pre-engagement window — which means it cannot justify reallocating budget away from captured intent.

EXECUTIVE TAKEAWAY

You cannot manage what you do not measure. If preference formation is not on the dashboard, the roadmap defaults back to the captured-intent tools that are measurable but structurally too late.

SECTION 09

An anonymized case pattern

A composite pattern drawn from recent GetRev engagements illustrates the transition. A Series C SaaS company with a strong product and ambitious growth targets was seeing pipeline shortfalls despite record demand-gen spend. The team ran a modern stack — intent data, ABM platform, multi-channel nurture, well-tuned SDR cadences. On paper, everything looked right. In practice, pipeline was under plan and the deals that closed were competitive slugfests.

63%

of active-pipeline accounts had first appeared through **captured intent** — a review-site visit, a content download, a competitor comparison. In every case, the buyer was already deep enough in research that a preferred vendor had emerged. The company was, in the majority of its own pipeline, the second or third vendor to enter the conversation.

Exegraphic modeling against the closed-won population produced a different account list. Roughly **40% of the exegraphic-high-fit accounts were not in the active pipeline at all.** They had not tripped an intent signal, so the intent-driven program had never surfaced them — but they matched, on a structural basis, the operational profile of the vendor's best customers.

The team reallocated a portion of budget to exegraphic signal activation — early engagement through LinkedIn thought leadership, named-author content syndication, and email nurture tied to the exegraphic signal. In parallel, it invested in AI-search visibility: category-comparison content, expert-author category positions, and structured content designed to be quoted by AI assistants.

SECTION 09 · THE RESULT

Within two quarters, the pipeline composition shifted

PRE-ENGAGEMENT PIPELINE SHARE

~~<25%~~ → **>55%**

PREFERRED-VENDOR ARRIVAL

minority → **plurality**

on high-fit deals, measured through first-call fielding.

Overall pipeline volume was flat, but win rate on identified opportunities climbed, sales cycles at the top of the funnel compressed, and the average deal size on preference-preferred deals ran materially above the average of intent-sourced deals.

> ***"They did not win more deals by working harder on the pipeline in front of them. They won more deals by moving upstream to the pipeline that had not identified itself yet."***

EXECUTIVE TAKEAWAY

The pattern reverses when the demand-gen budget moves upstream. Fewer deals arrive with preference set against you. More arrive with preference set toward you.

SECTION 10

A 90-day roadmap

The transition from intent-driven to preference-formation demand-gen is a program change, not a tool swap. A pragmatic 90-day roadmap looks like this.

Days 1–30

DIAGNOSTIC & MODELING

Pull 12 months of closed-won and closed-lost outcomes. Score the pipeline by intent-sourced vs pre-engagement-sourced. Identify the exegraphic signals that correlate with closed-won, and model the addressable market against them to produce a rank-ordered account list. Baseline exegraphic-fit pipeline share, preferred-vendor arrival rate, and current AI-search citation rate for a defined query set.

Days 31–60

ACTIVATION

Launch coordinated outreach to the top decile of pre-engagement window accounts, anchoring every touchpoint on the exegraphic signal that qualified the account. Publish or reallocate toward category-comparison content and named-author expert positions designed to be quoted by AI assistants. Introduce buying-committee coverage across email and LinkedIn — reaching hidden buyers as well as visible ones.

Days 61–90

MEASURE & ITERATE

Track pre-engagement pipeline share weekly. Instrument first-call fielding to capture preferred-vendor arrival rate. Refresh exegraphic modeling monthly against updated closed-won data. Refine AI-search visibility work against citation-rate baselines. Present the pipeline composition shift to the executive team as the leading indicator of demand-gen effectiveness.

By day 90, the program should show demonstrable movement on pre-engagement pipeline share, an operational exegraphic account list feeding both marketing and sales, and a measured AI-search visibility baseline — the platform for compounding advantage over the following four quarters.

> **EXECUTIVE TAKEAWAY**
>
> The transition is not exotic. It requires reallocating spend from downstream signals to upstream ones — and building the measurement layer that proves the reallocation is working.

SECTION 11

Sources

Forrester
B2B Buyer Behavior Research (ongoing 2025–2026 surveys)

Walker Sands
2026 State of B2B Buyer Research

Ahrefs
2026 AI Search Referral Analysis

Aggregated 2026 AI-search & GEO industry reports
Brandlight, LLMrefs, Sapt, Mersel AI

GetRev
Proprietary engagement data across B2B AI demand generation programs; anonymized composite pattern drawn from Series C SaaS engagements (2025–2026)

SECTION 12

About GetRev

GetRev is the AI demand generation company. We use predictive data and full-service execution to deliver pipeline — not just leads. At the core is our proprietary exegraphics dataset, which reveals how companies operate and make decisions, providing insight into which accounts are structurally most likely to buy.

Our team runs campaigns end-to-end — from audience selection and content syndication to delivery and measurement — ensuring every marketing dollar works harder. For teams making the transition from captured-intent demand-gen to preference-formation demand-gen, our engagements combine exegraphic modeling, multi-channel activation, and AI-search visibility work under a single accountable operating model.

Generate demand with AI precision.

Talk to GetRev about a preference-formation assessment for your team.

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