

THE DAY ZERO LIST: HOW B2B PIPELINE IS WON BEFORE BUYERS START LOOKING

Speak with a demand expert to assess your day zero positioning



By Alexander Kesler
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Executive Summary

The most consequential phase of the B2B buying journey is invisible to most marketing organisations. It happens before any formal buying activity begins, in what is referred to as day zero: the accumulated influence, brand exposure, and professional experience that informs how buying groups form their day one shortlists.

By the time formal evaluation starts, the day zero experience has already shaped who will win.

To capture this opportunity, B2B marketing organisations ought to:

Build systematic brand authority, buying group presence, and AI discoverability (as referred to as AI brand visibility) to earn shortlist positions through accumulated credibility rather than late-stage outreach

Integrate intent data within a broader signal strategy by combining it with first-party behavioural data and buying group engagement patterns to determine emerging interest before the shortlist has formed

Adopt new measurement frameworks centred on shortlist placement, brand influence, buying group coverage, and AI discoverability rather than lead volume alone

Read below for the full day zero framework and its application to demand generation strategies.

3 reasons why most pipeline investment arrives too late

Most B2B pipeline investment is deployed after buying groups have made their decision.

95%

of eventual winners already appear on the buyer's day one shortlist.

6sense, 2025

This is not a new pattern. Research across multiple years and methodologies confirms that shortlists are overwhelmingly pre-formed: 92% of buyers start with a shortlist already built, and 41% begin with a single preferred vendor ([Forrester, 2024](#)). The common driver is brand recognition. 78% of buyers shortlist products they have heard of before starting research, rising to 86% among enterprise buyers ([TrustRadius, 2024](#)), and 45% of global B2B buyers rate brand familiarity as a decisive shortlisting factor ([INFUSE Voice of the Buyer 2026](#)).

85%

of winning deals involve direct prior experience with the vendor.

6sense, 2025

Indeed, according to [INFUSE Voice of the Buyer 2026](#) prior positive experience ranks among the top five shortlisting criteria across all regions. Peer validation also influences preference, with 82% of B2B buyers reporting that peer experiences play a significant role in their provider selection ([G2, 2024](#)).

Buyers complete

61%

of the total buying journey before engaging any seller.

6sense, 2025

The selection phase, during which buying groups research, compare, and rank vendors without any seller involvement, still consumes the majority of the cycle.

How long is the average B2B buying cycle?

The average global buying cycle has shrunk to seven months from eight ([INFUSE Voice of the Buyer 2026](#)).

These findings highlight an uncomfortable reality: the vendors on the day one shortlist have secured their position through months, likely years, of accumulated exposure, thought leadership, peer influence, and brand credibility.

By the time buyers reveal their preferences, there is a very short window of time to compete. Building day zero influence is, therefore, imperative for supporting competitive positioning and revenue opportunities.

What is the difference between day zero and day one shortlist?

The day one shortlist is not built on day one. It is simply revealed on day one.

AI-assisted research, peer networks, and community interactions rarely generate trackable signals. Marketers should use buyer intent data as validation for dark-funnel activity and pair it with broader discoverability initiatives to ensure their brand is present long before intent becomes detectable.

What is the day one shortlist?

Day one is the moment a buying group initiates a formal search. Buyers prompt AI tools and conduct independent research for vendor recommendations, review the results, and add brands they already recognise. Therefore, recognition precedes selection.

What is day zero?

Day zero is all of the activity that precedes day one. It is the cumulative effect of brand exposure, thought leadership, peer recommendations, content consumption, and professional experience that determines which vendors a buyer already knows and trusts when the buyer's journey begins.

With buying groups averaging nine to ten members and each buyer consuming an average of nine content pieces per evaluation, the volume of day zero touchpoints required to build that familiarity across a full buying group is substantial ([INFUSE Voice of the Buyer 2026](#)).

This challenge is compounding. 94% of buyers now use LLMs during their buying process ([6sense, 2025](#)), making AI-generated shortlists a primary day one entry point. Brands without sustained day zero activity are unlikely to appear in these results or to be added by the buying group members reviewing them.

Marketers are responding. [INFUSE Voice of the Marketer 2026](#) shows brand spend as the top investment priority, while lead volume as a primary responsibility has dropped 28 points year over year. However, brand investment alone does not translate into shortlist positions without relevant and compelling experiences. Only 42% of marketers personalise outreach by role across the buying group, and only 6% are implementing AI-driven personalisation. Successfully converting brand visibility into shortlist positions requires [experiences tailored to each member of the buying group](#).

“Day zero is not a phase of the funnel. It is the entire foundation on which vendor shortlists are built. If your brand is not present when buyers are forming preferences, no amount of late-stage execution will compensate.”



Victoria Albert
CMO, INFUSE



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What happens when every vendor receives the same intent signal?

Intent data was designed to solve a specific problem: identifying buyers at the moment of active research and intercepting them before a decision is finalised. However, as a standalone signal, the intent model is structurally misaligned with the B2B purchasing reality it was built to address.

The traditional intent model was straightforward, but it only functions when few organisations have access to the same data insights.

Intent model scenario:

A mid-market financial services firm with 1,500 employees downloads two analyst briefs on cloud cost optimisation over the course of a month. Their operations team is exploring whether to consolidate workloads across existing cloud providers, a decision still in its early stages.

The research activity registers as an intent signal for cloud migration solutions. Multiple vendors subscribed to that intent feed receive the same notification and begin outreach to the account. Over the following weeks, team members across the operations department are contacted by vendors they have never heard of. The VP of operations sets up email filters to manage the volume. A senior engineer unsubscribes from three vendor sequences in a single afternoon. The procurement lead stops opening messages from unfamiliar senders entirely.

They were conducting early-stage research, not evaluating vendors.

The intent signal did not create a competitive advantage. It simply triggered a commodity response.

[INFUSE Voice of the Buyer 2026](#) data reveals that 42% of purchases stall because vendors engaged at the wrong time or failed to communicate value. [Forrester](#) confirms the broader pattern: 86% of B2B purchases stall during the buying process, and 81% of buyers report dissatisfaction with the provider they ultimately choose.

Intent data has not become irrelevant, but its value has migrated. When combined with other data sources and applied earlier in the journey, [intent signals can inform engagement strategies](#) that influence B2B buying groups across target accounts.

Intelligence, by definition, derives its value from exclusivity. When every vendor processes the same triggers and launches the same outreach, no organisation gains a differentiated view. The dark funnel has compressed from nine months to seven months ([INFUSE Voice of the Buyer 2026](#)), narrowing the window for reading early signals and making their quality more consequential than ever.

Genuine advantage belongs to those that generate proprietary signal synthesis: combining first-party behavioural data, buying group engagement patterns, and contextual research activity into a view that competitors cannot replicate.

The following table summarises the shift:

	Legacy intent model	Day zero signal model
Timing	Intercept at the decision stage, after the shortlist has formed	Read early signals from buying groups before a shortlist exists
Signal source	Commodity intent feeds shared across dozens of vendors	Proprietary synthesis of first-party data, buying group patterns, and contextual research
Probability	5% (the inverse of the 95% shortlist lock)	Aligned with the 95% window where outcomes are determined

The 4-step day zero influence framework

The following framework breaks day zero influence into four demand generation levers.

Each represents a capability that directly influences whether an organisation builds the positioning necessary for consideration before formal buying activity begins.

Level	What it builds	Key evidence
1 Brand authority	Accumulated credibility, recognition, and trust before any buying activity begins	Thought leadership ranks as a top discovery initiative across all regions (INFUSE Voice of the Marketer 2026)
2 Buying group presence	Relationships across the full buying group, not just a single contact	Only 42% of marketers globally use multi-threading (INFUSE Voice of the Marketer 2026)
3 AI discoverability	Accurate brand representation in AI-generated vendor shortlists	94% of buyers use LLMs in their search and discovery (6sense, 2025); yet, according to INFUSE Voice of the Marketer 2026 only 21% of marketers forecast investment in answer and generative engine optimisation (AEO and GEO) strategies
4 Intent signal intelligence	Proprietary insight into day zero buyer movement that competitors cannot access	Only 25% of marketers use real-time signal adaptation (INFUSE Voice of the Marketer 2026)

1 Brand authority

Brand authority is the credibility, recognition, and trust that sustained, role-specific content builds across a target audience before any buying activity begins.

Prior positive experience with a vendor ranks among the top five shortlisting criteria across all regions ([INFUSE Voice of the Buyer 2026](#)). [Edelman and LinkedIn](#) found that 75% of decision makers reported thought leadership as a key influence for researching a product or service they were not previously considering.

To build brand authority, go-to-market (GTM) teams should focus on three areas:

- 1. Create content that serves the buyer’s decision:** 43% of marketers globally rank thought leadership as a top discovery initiative ([INFUSE Voice of the Marketer 2026](#)). However, lasting brand authority requires [research, benchmarks, frameworks, and technical resources](#) that directly support the buyer’s internal decision making process. [Content must be buyer-led](#) to enable each member to build their internal business case.
- 2. Earn citation authority by becoming an industry reference:** Brand authority compounds when third-party experts, analysts, and peer communities reference an organisation’s research as a credible source. Publishing original data with deep insights creates a compounding visibility effect across channels the organisation does not control, adding to brand authority.
- 3. Measure content performance by engagement depth, not volume:** Brand visibility and authority ranks as the number one content strategy goal in NAM at 67% ([INFUSE Voice of the Marketer 2026](#)). While brand authority is challenging to quantify, increased visits per visitor, time on page, AI citation frequency, and third-party citation rates are strong indicators of performance.

To assess whether these efforts are building brand authority, track the following indicators across owned and third-party channels:

Metric	What it indicates	Why it matters
Page visits per visitor	Professionals returning to the brand as a resource	Repeat visits signal the brand is becoming a reference point
Time on page	Content is being used, not just scanned	Deeper engagement suggests the content supports active decision making
AI citation frequency	Brand appearing in LLM-generated recommendations	Indicates authority earned during buyer research
Third-party citation rate	External experts or publications referencing the brand’s content	Measures whether the brand is treated as a credible source by others
Branded search volume	Buyers searching for the brand by name	Growth suggests day zero impressions converting to active recognition

2 Buying group presence

Buying groups average nine to ten members ([INFUSE Voice of the Buyer 2026](#)), with enterprise purchases including up to 13 internal stakeholders and 9 external influencers on a typical deal ([Forrester's State of Business Buying, 2026](#)). Despite this reality, only 42% of go-to-market (GTM) teams globally currently leverage multi-threading tactics to reach the full buying committees ([INFUSE Voice of the Marketer 2026](#)).

To build presence across the full buying group, GTM teams should prioritise three areas:

- 1. Enable each stakeholder to advance the decision from their perspective:** Buying group presence requires [buyer enablement](#), ensuring that [each role within the group has access to the information they need](#) to evaluate, advocate, or approve. When each stakeholder can independently progress their part of the evaluation, [the buying group moves toward consensus faster](#).
- 2. Develop role-specific content that maps to each stage of the internal decision:** GTM teams should build content libraries structured by stakeholder role and decision stage: early-stage content for problem definition, mid-stage content for vendor comparison, and late-stage content that equips champions to build internal business cases.
- 3. Build credibility to be referenced inside the account:** The most valuable form of buying group presence is when one stakeholder shares an organisation's content with another as part of their internal deliberation. Original research, evaluation frameworks, and benchmarks serve as decision making tools that position the brand as a trusted resource. Validate this by gathering structured feedback from accounts that close deals to identify which content each stakeholder encountered and where gaps slowed the process.

“Buying group engagement is an operational challenge, not a strategic one. Most organisations understand that they need to reach multiple stakeholders. The gap is in the infrastructure, data integration, and workflows required to personalise at the role level consistently.”



Larysa Zakirova
COO, INFUSE



3 AI discoverability

With 94% of buyers using LLMs during their B2B buying journey ([6sense, 2025](#)), the AI-generated shortlist has become a primary day one entry point. AI discoverability, or AI brand visibility, is therefore a foundational component of day zero strategies.

However, despite the role of AI in the buyer's journey, its output is not taken at face value. 90% of buyers who encounter AI overviews click through to at least one cited source for fact-checking ([Trustradius, 2025](#)). This highlights the need for day zero demand, as [true AI discoverability](#) only works in concert with brand authority and buying group presence.

Yet, B2B marketer investment lags far behind buyer adoption. AEO/GEO are cited as a discovery initiative by only 25% of marketers in APAC, 21% in NAM, and 19% in EMEA ([INFUSE Voice of the Marketer 2026](#)), making it one of the clearest first-mover opportunities in day zero strategy.

To close this gap, GTM teams should focus on three areas:

- 1. Audit and establish baseline AI visibility:** Systematically prompt major LLMs with the queries buyers are likely to use. Assess whether the brand appears, how accurately it is described, and how it compares to competitors. This audit provides the baseline against which AEO strategies are measured, but must be performed regularly to be considered a benchmark.
- 2. Build the content architecture that AI systems can consume:** This requires ensuring that technical aspects of pages are implemented, such as schema markup (FAQ, HowTo, Organisation, Product). This makes content machine-readable, securing consistent citations through PR and vendor comparison content, and ensuring capabilities are described with the specificity that LLMs require.
- 3. Monitor AI visibility as an ongoing competitive discipline:** LLM outputs shift often as new content is ingested. Track share of voice, citation frequency, and competitive displacement on a regular cadence, connecting AI visibility to pipeline outcomes.

The following metrics help GTM teams track AI discoverability as a competitive position rather than a one-time audit:

Metric	What it indicates	Why it matters
Share of voice in AI responses	How frequently the brand appears relative to competitors	Measures consideration in AI-mediated shortlisting
Citation accuracy	Whether AI tools describe capabilities correctly	Inaccurate descriptions exclude the brand from relevant queries
Competitive displacement	How often competitors appear where the brand should	Identifies queries where AEO investment should concentrate
AI-sourced traffic	Visits originating from AI tool referrals	Connects AI visibility to actual buyer behaviour
Schema coverage	Key content with structured data markup	Indicates whether the technical foundation for AI ingestion is in place

“Organisations fund brand and acknowledge the AI discovery imperative, yet default to familiar tactics. The gap between understanding AEO and implementing it is where leaders will separate from those left on the shortlist.”



David Verwey
CCO, INFUSE



4 Signal intelligence

Signal intelligence is the practice of generating proprietary insight into day zero buyer movement by combining first-party behavioural data, buying group engagement patterns, and early-stage research activity into a view that competitors operating on commodity data cannot access.

Currently, only 25% of marketers globally use real-time signal adaptation ([INFUSE Voice of the Marketer 2026](#)), creating a competitive opportunity for those who combine intelligence.

To build signal intelligence as a demand generation capability, teams should focus on three areas:

- 1. Layer multiple signal sources into a composite view:** Combine third-party intent with first-party engagement data, buying group coverage data, and contextual indicators (leadership changes, funding rounds, technology adoption). The advantage comes from synthesis, not any single source.
- 2. Prioritise signal exclusivity over signal volume:** Invest in proprietary signal sources such as engagement data from owned content programs, behavioural patterns from buying group interactions, and first-party research activity.
- 3. Close the gap between signal detection and action:** Develop [workflows connected to your CRM that flag and measure intent](#), sharing insights with GTM teams that enable them to craft relevant responses. Timeliness is essential: a signal acted on a week after detection has lost most of its differentiating value.

How to measure whether demand generation is building day zero influence

Demand generation has not lost its purpose. It has found its real one.

Organisations that treat demand generation solely as a pipeline capture mechanism are investing in the tight 5% window. Those who treat it as the day zero engine, building brand authority, buying group presence, AI discoverability, and signal intelligence, are investing in the 95% window.

This is a return to marketing fundamentals, but with new empirical precision. When 42% of purchases stall because of timing misalignment or failed value communication ([INFUSE Voice of the Buyer 2026](#)), the cost of bypassing day zero becomes quantifiable. [Gartner](#) reinforces the case, arguing that B2B brand programs must “condition the market and create pre-funnel awareness” to accelerate pipeline velocity. Day zero influence is the mechanism through which that conditioning occurs.

To track whether day zero investment is working, three leading indicators should replace or supplement traditional pipeline metrics:

- 1. Shortlist placement and brand influence:** The percentage of target accounts where the brand appears on the initial vendor shortlist, and the degree to which target audience professionals associate the brand with credibility in its category. Both require direct buyer feedback, typically gathered through incentivised surveys, post-purchase interviews, or third-party brand tracking studies.
- 2. Buying group coverage:** The percentage of identified buying group members across target accounts who have been engaged through content, events, or direct touchpoints.
- 3. AI discoverability accuracy:** The degree to which AI tools accurately represent the brand's capabilities when prompted with category-relevant queries.

“While competitors continue to optimise visible funnel stages, leaders are already building influence in the day zero window. The competitive advantage belongs to those who measure shortlist presence, not just pipeline volume.”



David Verwey
CCO, INFUSE



Day zero is not a metaphor. It is the empirically documented reality that the majority of B2B purchase outcomes are determined before formal buying activity begins. Those that build systematic day zero influence will not need to compete for the shortlist. They will already be on it.



Key takeaways

The invisible pipeline represents the largest untapped opportunity in B2B demand generation: the influence that determines shortlist outcomes before any formal buying activity begins.

01

THE SHORTLIST IS LOCKED BEFORE DAY ONE

Research consistently confirms that vendor shortlists are pre-formed before formal evaluation begins. The common driver is brand recognition: accumulated credibility earns shortlist positions, not late-stage outreach.

02

DAY ZERO IS WHERE PIPELINE VALUE FORMS

Day zero, the full body of brand exposure, thought leadership, and professional experience that precedes a formal search, determines which vendors buyers already know and trust when evaluation begins. Demand generation is the function that builds this influence systematically.

03

FOUR LEVERS BUILD DAY ZERO PRESENCE

Commoditised intent signals activate after the shortlist has formed. Brand authority, buying group presence, AI discoverability, and signal intelligence work together to earn shortlist positions before first contact, turning intent from a standalone trigger into one input within a broader signal intelligence capability.

BUILD YOUR DAY ZERO INFLUENCE

INFUSE demand experts work with you to craft precision demand generation programs that build brand authority, engage buying groups, and establish AI discoverability across your target market.

[Speak with a demand expert to assess your day zero positioning](#)



**AUTHOR**

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Frequently Asked Questions (FAQ)

What is day zero in B2B demand generation?

Day zero is the period before formal buying activity begins, when brand exposure, thought leadership, peer recommendations, and professional experience shape which vendors a buyer already knows and trusts. This accumulated influence determines which brands appear on the day one shortlist when buying groups initiate evaluation.

Why is intent data alone no longer enough for B2B demand generation?

Intent data has become a commodity signal. When dozens of vendors receive the same notification on the same buyer activity, no organisation gains a differentiated view. Intent retains value when combined with first-party behavioural data, buying group engagement patterns, and contextual research signals into a proprietary synthesis competitors cannot replicate.

How do B2B vendors earn a place on the day one shortlist?

Vendors earn shortlist positions through accumulated day zero influence rather than late-stage outreach. Four levers build this influence: brand authority through buyer-led thought leadership, buying group presence through role-specific content, AI discoverability through structured data and citation strategy, and signal intelligence through proprietary data synthesis.

How is day zero influence measured?

Three leading indicators replace traditional pipeline metrics for day zero.

- Shortlist placement tracks the percentage of target accounts where the brand appears on initial vendor lists.
- Buying group coverage measures engagement across identified stakeholders.
- AI discoverability accuracy assesses how correctly AI tools represent the brand when prompted with category-relevant queries.

Where should B2B marketers start when building day zero influence?

Most organisations benefit from a day zero positioning audit before reallocating spend. This involves mapping current shortlist presence across target accounts, assessing AI discoverability against competitors, and identifying gaps in buying group coverage. INFUSE demand experts conduct these assessments and design programs that translate findings into measurable shortlist gains.

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What factors influence B2B buyers' decisions?

B2B buyer decisions are shaped by accumulated brand familiarity, prior positive experience, peer validation, and the relevance of content encountered before formal evaluation. Research shows 78% of buyers shortlist products they have heard of before starting research ([TrustRadius, 2024](#)), 85% of winning deals involve direct prior experience with the vendor ([6sense, 2025](#)), and 82% report peer experiences as a significant factor in provider selection ([G2, 2024](#)). Brand authority, accurate AI brand visibility, and buying group coverage compound across the B2B buyer journey to determine which vendors enter consideration before day one.

What are the key stages in the B2B buyer journey?

The B2B buyer journey unfolds in two empirically distinct phases. Day zero spans the entire period before formal buying activity begins, when brand exposure, thought leadership, peer recommendations, and AI-generated discovery shape which vendors a buying group already knows. Day one begins when the group initiates formal evaluation: defining requirements, comparing vendors, and ranking options. Buyers complete approximately 61% of the total B2B buying journey before engaging any seller ([6sense, 2025](#)), meaning the buyer's journey is largely decided in self-directed research before sales contact occurs.

How can I effectively build brand authority online?

Building brand authority online requires three sustained practices. First, create research, benchmarks, and frameworks that directly support the buyer's internal decision making rather than promotional content. Second, earn citation authority by publishing original data and insights that third-party analysts, peer communities, and AI search engines reference as credible sources. Third, measure performance by engagement depth (page visits per visitor, time on page, AI citation frequency, third-party citation rates) rather than reach. Brand authority compounds when buyers encounter consistent, useful content across owned and external channels throughout the B2B buyer journey.

How can I improve my brand's visibility using AI strategies?

To improve brand visibility using AI strategies, organisations should pursue three coordinated initiatives. First, audit baseline AI visibility by prompting major LLMs with the queries buyers are likely to use, assessing how the brand appears, how accurately it is described, and how it compares to competitors. Second, build content architecture that AI systems can ingest, including FAQ, HowTo, Organisation, and Product schema markup, and describe capabilities with the specificity LLMs require for accurate citation. Third, monitor AI brand visibility as an ongoing discipline, tracking share of voice, citation accuracy, and competitive displacement on a regular cadence. These are the foundational steps for how to improve brand visibility in AI search engines and earn shortlist positions in AI-generated vendor recommendations.

What strategies improve brand visibility in AI search engines?

The strategies that improve brand visibility in AI search engines fall into four categories. Technical optimisation through schema markup (FAQ, HowTo, Organisation, Product) makes content machine-readable for LLM ingestion. Citation strategy ensures the brand is referenced consistently across PR, vendor comparison content, and original research that AI systems weigh as authoritative. Content specificity describes capabilities precisely so LLMs accurately represent the brand for relevant queries. Competitive monitoring tracks share of voice, citation frequency, and competitive displacement so investment is directed where AI brand visibility gaps exist. Together, these answer what strategies improve brand visibility in AI search engines for B2B vendors competing for shortlist positions.





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