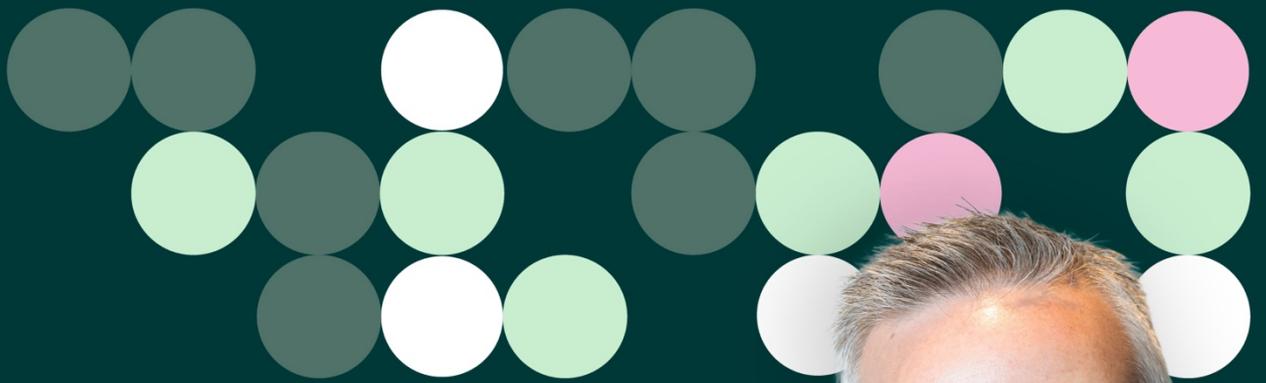


The B2B matrix of influence

Quantifying and clarifying the role
of thought leaders, influencers and
advocates within B2B marketing.



Trust &
Influence
in **B2B** Podcast
with Joel Harrison

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Trust has always been foundational in B2B marketing and sales, but the rise of AI, plus disintermediation and content overload has made trust harder to attain and retain.

Thought leaders, influencers and advocates are powerful exponents of trust, but who are these individuals and how do you use them to maximum affect in your marketing campaigns? Terminology is increasingly and sometimes deliberately confused. This matrix is designed to provide clarity on when doing so.

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Definitions & terminology

Many definitions have been offered for these roles (or personas) over the years, but typically they are intended to define them in isolation not in context with the other roles listed here. That both enables and requires clarity and focus which otherwise would be absent.

It's critical to note that some of these individuals are on your company's payroll and others are not, because this will define how you engage with them and motivate them.

- **Thought leaders:** Individuals who are a focal point and/or originator of thought leadership material, based on their authority or expertise rather than seniority. These are company employees.
- **Employee advocates:** Individuals with direct customer contact and therefore likely to be in junior or mid-level roles in the organisation and able to engage customer directly via various channels.
- **External influencers (unpaid):** These are likely to be prominent figures for whom integrity and authority are likely to be highly important, including journalists, analysts, consultants and authors.
- **External influencers (paid):** These are so-called professional influencers, who have built a following and an audience amongst key customer groups and are actively seeking to monetise content creation and promotion opportunities.
- **Customer advocates:** Individuals who have purchased and/or used the products or services of an organisation (either in their current role or a previous one) and are happy to actively or passively recommend.

Deployment of these personas within B2B campaigns

Using the data from the B2B Marketing Awards (the world's largest dedicated and specialist B2B marketing programme) we can see extent to which these personas are being used across a large number of campaigns.

customer advocates are less common and employee advocates or professional influencers are less utilised still. This demonstrates that too many B2B brands are failing to leverage these key trust repositories to elevate their campaigns.

Category	% of entries which utilised these individuals
1. Individual thought leaders/experts	28.2%
2. Other internal employee advocates	5.4%
3. Unpaid external influencers (journalists, analysts)	24.6%
4. Professional/paid external influencers	3.7%
5. Customer advocates	11.0%

Understanding more about thought leaders, influencers and advocates

The following table is designed to provide deeper insights into these highly important individuals, who may appear very similar from the outside but in reality are very different in terms of characteristics, behaviour and motivation.

	Internal (they work for your company)		External (they don't work for your company)		
	Thought leaders	Influencers		Advocates	
Commercial model - are they paid to influence?	Not usually paid to promote; monetisation via books, consulting, speaking	Not commercially rewarded for influence; insights come from day-to-day customer interaction.	Not usually paid directly by brands; may be funded by media orgs	Primarily paid/sponsored	Not paid; influence is voluntary, authentic and organic. Although referral programmes are emerging
Relationship to brand/org	Independent, but may align with or critique brands/orgs	Employed frontline representatives of the organisation.	Independent but may cover brands/orgs	Commercial partnership	Direct relationship as users of the brand
Motivation & purpose	Educate, shift paradigms, inspire change	To help customers succeed and resolve issues.	Inform, analyse, critique	Commercial, visibility, lifestyle	Share real experiences, seek to help peers, advocate (or warn)

Source of credibility	Expertise, original thinking, proven track record	First-hand, practical exposure to customer behaviours	Investigative rigour, analysis, editorial independence	Popularity, relatability, lifestyle projection	First-hand experience of the product/service
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	Internal (they work for your company)		External (they don't work for your company)		
	Thought leaders	Influencers		Advocates	
Trust & authenticity	High — rooted in intellectual credibility	Very high — customers trust them because they are “real people”	Higher, but depends on perceived independence	Can be seen as transactional	Extremely high; peers are trusted more than brands
Audience type & reach	Industry peers, policymakers, global leaders	Customers, users, prospects, and service recipients.	Niche/industry or issue-specific reach	Broad public/consumer reach	Other customers, potential buyers, wider market
Platform of influence	Conferences, research papers, keynote talks, long-form media	Customer service channels, email, chat platforms, social media.	Press, industry reports, reviews, podcasts	Social media, YouTube, Instagram, TikTok	Reviews, testimonials, forums, word-of-mouth, communities
Content depth	Deep, research-driven, original frameworks	Deep knowledge of customer scenarios, challenges, and product/service realities — experiential rather than conceptual.	Moderate — analysis, reporting, synthesis	Light, engaging, viral-oriented	Authentic but variable; anecdotal, experience-driven
Content formats	Long-form POVs, research reports, frameworks, keynotes, deep-dive interviews.	Customer insights, practical tips, demos, behind-the-scenes moments, frontline observations.	Independent reviews, expert analysis, contextual commentary, interviews, industry explainers.	Sponsored posts, short videos, tutorials, trend-driven content, social-first endorsements.	Testimonials, reviews, case studies, real-world tips, user-generated experiences.
Engagement style	Thought-provoking, dialogic, mentor-like	Empathetic, responsive, practical; centred on solving customer problems through direct communication.	Inform/report, one-to-many	Broadcast, one-to-many	Peer-to-peer, community-driven, grassroots
Longevity of influence	Typically long-term, anchored in intellectual contributions	Sustained as long as they remain in customer-facing roles with frequent interaction and trusted relationships.	Sustained as long as their platform is respected	Often short-term, trend-driven	Long-term if loyalty is high; fragile if trust is broken
Measurable impact	Strategic shifts, innovation, new frameworks adopted	Customer satisfaction, loyalty, retention, reduced friction, problem identification, and improved feedback loops.	Reputation, agenda-setting, framing debates	Awareness, engagement, sales	Loyalty; advocacy; purchasing influence.

How to work with thought leaders, influencers and advocates?

So now you know who all the protagonists are, when and how should you work with each persona?

	Internal (they work for your company)		External (they don't work for your company)		
	Thought leaders	Internal advocates	External influencers (unpaid)	External influencers (paid)	Customers
When to work with them	Strategic thought leadership programmes	Customer insight validation	Narrative shaping	Awareness-driving campaigns	Late-stage funnel influence
	Category creation or reframing	Humanising the brand	Market validation	Social-first launches	Testimonials and case studies
	High-level narrative positioning	Service storytelling	Educating complex issues	Channel amplification	Trust-building campaigns
	Research-based campaigns	Product context and real user insight	Category or proposition launches	Creative experimentation	Retention or loyalty efforts
	Executive-level influence	Community or retention programmes	Building authority in new spaces	Community activation	Community engagement
How to work with them	Provide narrative pillars and research	Keep content authentic	Offer data and expert access	Provide flexible briefs	Make participation easy
	Use structured co-creation sessions	Protect their workload	Respect independence	Set clear KPIs	Let them speak authentically
	Maintain message discipline	Provide clarity and boundaries	Engage early in planning	Choose for audience fit	Avoid over-scripting
	Give intellectual freedom within framework	Ensure voluntary participation	Build long-term relationships	Encourage authentic storytelling	Focus on relationships
	Use recurring episodic formats	Build feedback loops	Be transparent and substantive	Prioritise long-term partnerships	Share outcomes and impact

I'd love to keep you updated

as I continue explore the topics of thought leadership, influencer marketing and customer advocacy – if you'd like to stay updated about content like this, you can:

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