

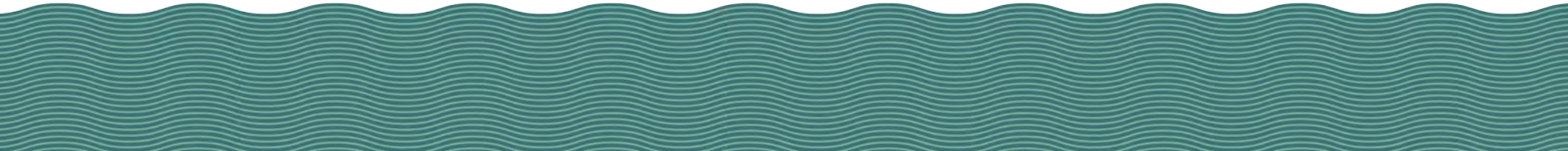


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ENGAGIO

# The Clear & Complete Guide to **Account Based Marketing**

Everything you need to know about winning the biggest deals



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# Introduction

## Seizing the biggest deals



B2B demand generation has almost completely re-invented itself over the last decade. The collision of inbound, content marketing, lead nurturing, marketing automation, analytics, email, search, social media and native advertising has transformed the discipline from a dark art to an increasingly data-driven science.

But there's a problem.

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All of these tactics and technologies are optimized for a specific kind of deal: higher velocity, lower value deals – the kind that are often driven through by a single buyer.

As a result, today's marketing departments struggle to support the most important deals of all: the long, complex sales that involve many stakeholders, departments and disciplines. The biggest deals.

When it comes to helping to land and expand these major deals, today's marketing teams are seriously handicapped.

**The Clear & Complete Guide to Account Based Marketing (ABM) is your guide to solving this problem.**

It will take you, step-by-step, through this fast-emerging discipline, showing you how to align your sales and marketing team around a strategy that's optimized for the biggest, most important deals.

As you'll see, ABM is not a magic wand. Instead, it's a powerful combination of people, process and technology that, deployed intelligently, will out-perform every other demand generation initiative in your company.

But ABM doesn't require you to unplug all that you're doing now and start over. Instead, it's a complementary strategy that works alongside your existing demand generation processes – sharing resources, data, tools and technologies with them.

We've seen Account Based Marketing in action across a wide range of companies, and we're convinced that this is the way virtually all big deals will be won and grown. Those who don't practice it will lose to those who do.

If your company depends on major, complex, long-cycle deals – landing and expanding them systematically, efficiently and measurably – this could well be the most important guide you'll ever read.

**Let's get to work.**



## Part I

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# From lead-centric to account- centric marketing



# Part I

## From lead-centric to account-centric marketing

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Today's marketing stacks – and marketing departments – are built around the 'lead', the individual buyer who progresses along your funnel until he or she is ready to buy.

But in most cases, the buyer is never a single person. He or she is almost always part of a buying team. And the bigger the deal, the more people, departments and disciplines get involved.

That's why so many B2B companies have hit a wall with their demand generation efforts.

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“Salespeople talk about accounts, they talk about customers... they don't talk about leads. Salespeople think about how they're going to win accounts in the first place, then how they're going to keep and grow those accounts.”

Megan Heuer  
SiriusDecisions

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**It's time to recognize that we're not marketing and selling to a lead. We're marketing and selling to an account.**

Lead-centric marketing isn't designed to handle accounts:

- It wastes time, budget and effort filling the funnel with prospects that aren't associated with any target account.
- It can't connect individual prospects with their colleagues across the account.
- It can't map the relationships between the decision-makers and influencers within the account.
- It can't track the state or level of engagement of the entire account at any given time.
- It can't coordinate or synchronize interactions to deliver consistent messages to the entire account buying team.

**That's where Account Based Marketing comes in.**

# It's called 'business-to-business' not 'business-to-lead'

In every complex business-to-business deal, there are many buyers involved: the decision-maker, the end user, the influencer, the CFO, the procurement department and so on.

Each of these people has different motivations and pain points. Each is rewarded differently and each evaluates your products or services from a different perspective.

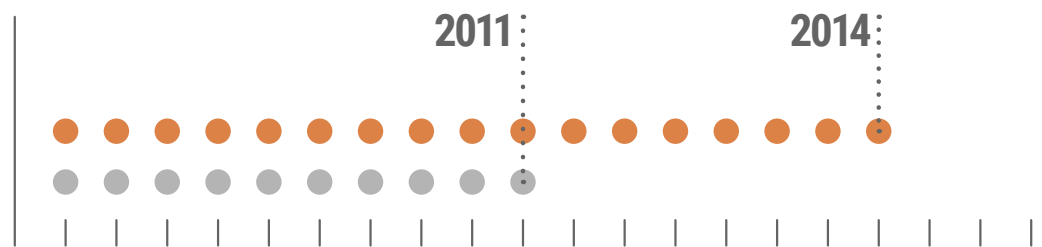
To support selling into a large account effectively, it's critical that your team understands how each individual fits into the larger account and has a sense of the relationships, influences and connections that bind them together.

That means your marketing team needs to understand the context of the account relationship to decide how to interact with any new person that comes into the system.

You also need to track the aggregate level of engagement across the account and know when that engagement level changes.

**Because, in B2B, you're never just selling to an individual.**

**Up to 17 people influence the typical enterprise purchase**  
(up from 10 in 2011)



IDG Enterprise Role & Influence of the Technology Decision-Maker survey, 2014.

The background is a solid teal color. Several fishing lures and hooks are scattered across the page. At the top left, a lure with a green teardrop-shaped body and two hooks hangs from a thin line. To its right, a simple hook hangs from a line. Further right, another hook hangs from a line. At the bottom left, a hook hangs from a line. In the bottom center, a lure with a green oval body and two hooks hangs from a line. At the bottom right, a lure with a green cone-shaped body, a black band, a yellow circular body, and two hooks hangs from a line. A horizontal dotted white line is positioned near the top of the page.

Salespeople never talk about  
how many **leads** they've closed.

They talk about how many  
**accounts** they've closed.

# Account Based Marketing defined

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As ABM gains traction, a lot of definitions are starting to emerge – all pretty much describing the same thing.

Here's our definition:

**Account Based Marketing is a strategic approach that coordinates personalized marketing and sales efforts to open doors and deepen engagement at specific accounts.**



# Account Based Marketing defined

**Marketing and sales:**  
a close collaboration  
between sales  
and marketing.

Account Based Marketing is a **strategic**  
approach that coordinates **personalized**  
**marketing and sales** efforts to  
**open doors and deepen engagement**  
at specific accounts.

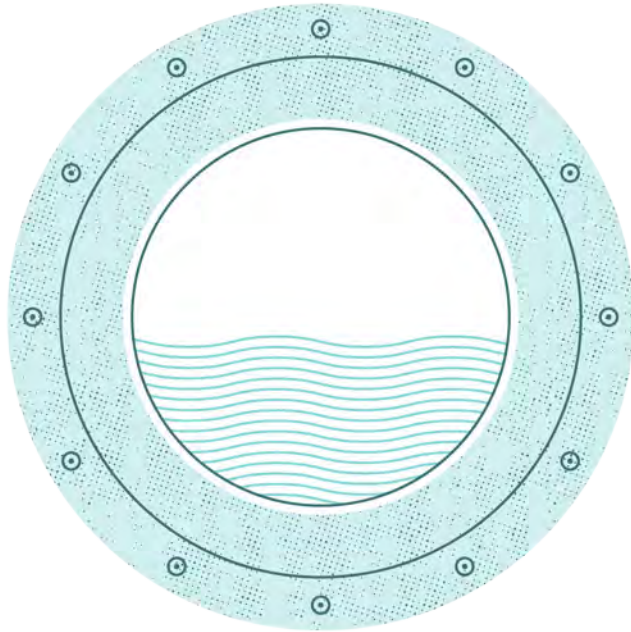
**Strategic:** not a simple  
campaign or tactic;  
it's a business strategy;  
not 'one and done';  
it's always on for  
an account.

**Personalized:** built on  
account-specific insight,  
content, and messages  
for maximum relevance  
and resonance.

**Open doors and  
deepen engagement:**  
focus on landing new  
accounts and  
expanding within  
existing accounts.

That's our definition. But we also like some  
of the other definitions we've seen out there...

# Some more definitions of ABM



“Treating individual accounts as a market in their own right. A structured approach to developing and implementing highly customized marketing campaigns to markets of one. This approach involves marketing and sales taking a close look at key business issues facing the target account, mapping those issues to individuals, and tailoring campaigns to address those issues.”

ITSMA (who coined the term)

“The strategic approach marketers use to support a defined universe of accounts, including strategic accounts and named accounts.”

SiriusDecisions

“The coordination of personalized marketing and sales efforts to drive engagement at a targeted set of accounts.”

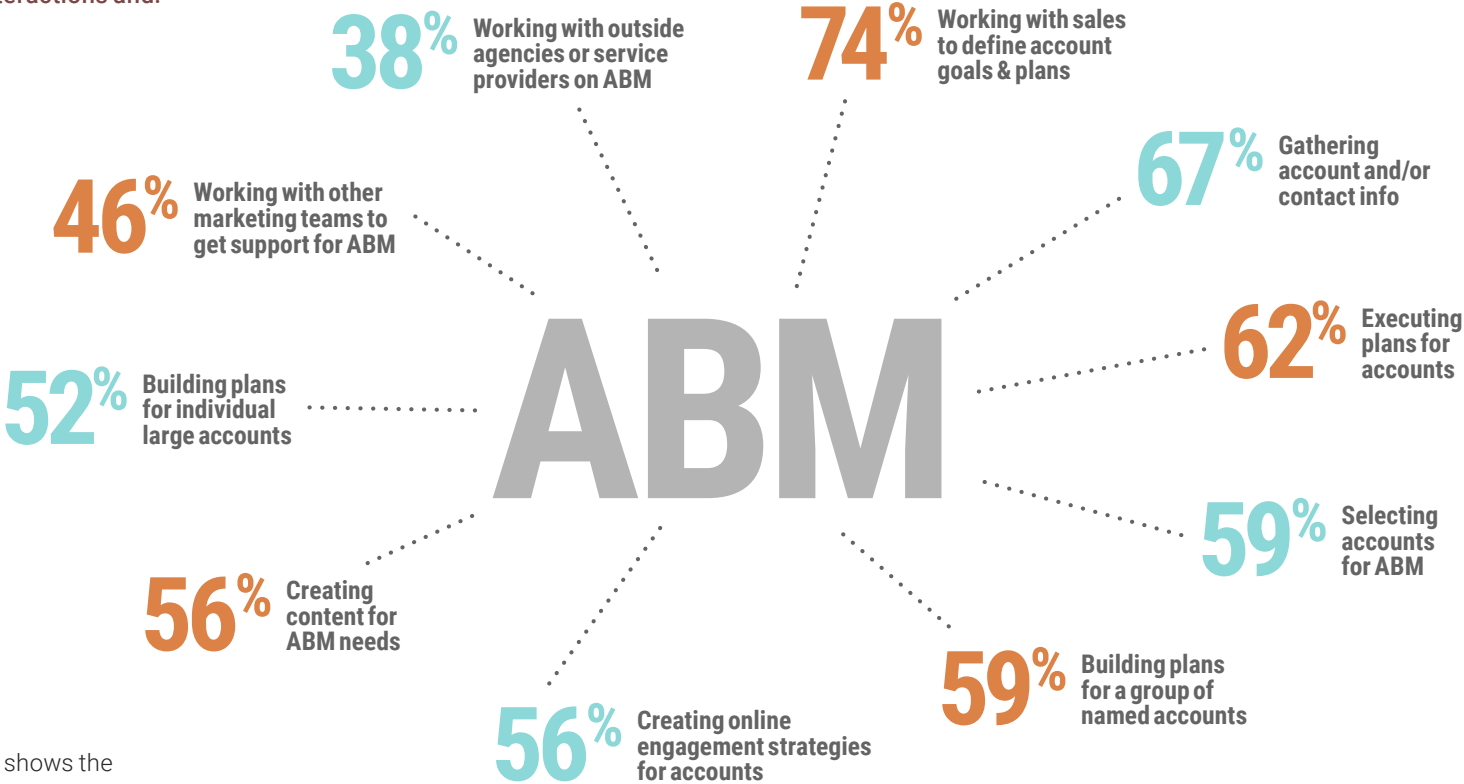
TOPO

## **One-to-One goes B2B**

In many ways, ABM parallels the movement in B2C marketing away from mass marketing to 1:1 marketing. Both focus on depth of the relationship and using a deep understanding to personalize each interaction.

# Things ABM practitioners do

ABM encompasses everything that B2B marketers do to support sales at target accounts, from selecting accounts to gathering intelligence, creating personalized interactions and:



This SiriusDecisions data shows the top ABM activities being practiced today.

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**“I see ABM as a response to inbound marketing. Inbound is great, but you don’t have control over quantity and quality. You also can’t afford to wait until those named account targets happen to find your content and download something.”**

**Matt Heinz**

**President of Heinz Marketing**

# The benefits of ABM

## Efficiency

### ABM focuses time and resources on accounts most likely to drive revenue

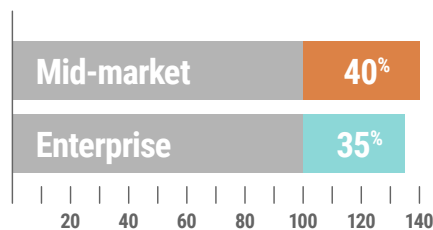
It's a 'zero waste' strategy that targets 100% of time, budget and effort on the named accounts your company decides as having the greatest potential.

## Big wins

### ABM deal sizes are bigger

An ABM success can outweigh dozens of smaller deals sourced through traditional demand generation. And ABM deals can be bigger than normal 'key account' selling too: they're more likely to have buy-in from a wider team; to lock out or constrain competitors; and to reach higher into the account. When ABM wins, it wins big.

Demandbase found that the average contract value (ACV) for targeted accounts was 40% higher for mid-market and 35% higher for enterprise accounts.



## Close rates

### ABM increases the close rates of your toughest deals

Research shows that this systematic discipline significantly out-performs the more ad hoc or unaligned approaches of the past. Demandbase saw a whopping 285% higher close rate for targeted enterprise accounts, and a 166% higher close rate for mid-market accounts when ABM was used.

## Acceleration

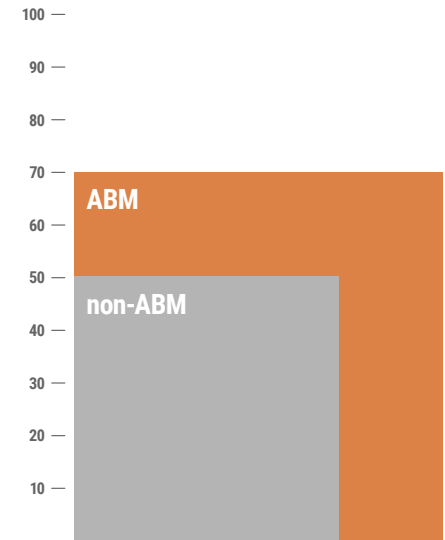
### ABM deals proceed faster

Because they actively target all of the buying influencers and decision-makers – instead of leaving hidden influencers to chance – ABM deals move faster and get stuck less.

## Alignment

### ABM tightly integrates your sales and marketing teams

By definition, it requires sales and marketing to focus on the same accounts with clear and agreed criteria. Sales highly values any marketing team that spends its budget gaining traction in named accounts.



“70 percent of ABM users report that their sales and marketing organizations are mostly or completely aligned, compared to 51 percent for non-ABM users.”

Account Based Marketing Adoption report, September 2015  
Demandbase and Demand Metric

# The benefits of ABM (cont'd)

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## Sales excellence

### ABM enables the challenger sale

Sales wants to have challenger sales conversations that “teach for differentiation and tailor for resonance”... ABM provides the ideal strategy and framework for this – and delivers the account insights that help make it happen.

## Customer experience

### ABM delivers the consistently relevant experience that customers demand

The highly personalized nature of the discipline means that all interactions are synchronized across channels and highly targeted to maximize relevance. You look like one company with a single, compelling story.

## Account penetration and expansion

### ABM guides intelligent account expansion at existing customers

Instead of the embarrassing SDR call that treats a long-time customer as a new lead, ABM delivers smart, personalized account development for a greater share of wallet and higher margin.

“Rising customer expectations are the most disruptive trend in business today. Companies that differentiate their customer relationships on the basis of account-specific insights and responsiveness raise customer expectations and create competitive advantage.”

IDC

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“ABM delivers the highest Return on Investment of any B2B marketing strategy or tactic. Period.”

ITSMA

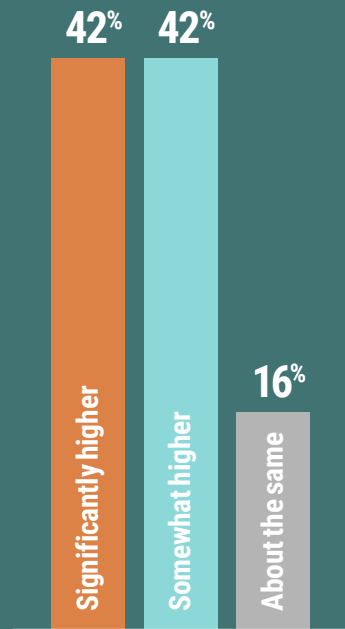
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# Data Snapshot

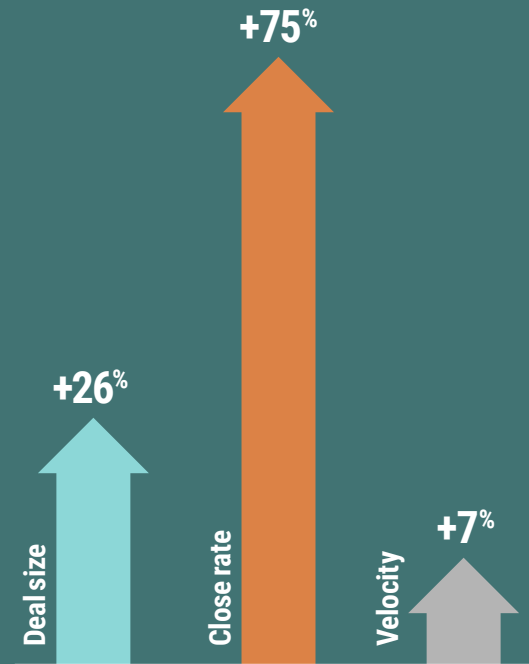
## ABM benefits

How does ABM return on investment (ROI) compare to other marketing initiatives?  
% of respondents (N=38)



A whopping 84% of respondents in this ITSMA survey said ABM delivered a higher ROI than other marketing.

The more practical ABM payoff  
(2014 results)



This Demandbase survey identified the top three benefits of ABM. Close Rate is the clear winner.



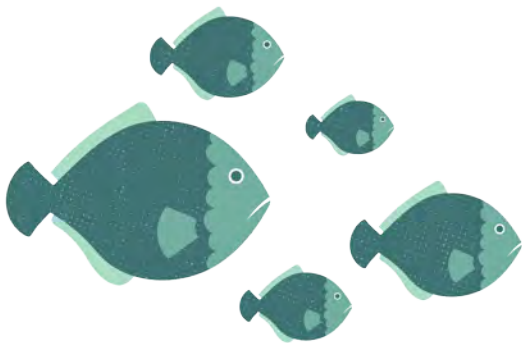
This Alterra Group data confirms that marketers who have tried ABM experience major returns.

# ABM is not just marketing

Despite its name, Account Based Marketing is not exclusively a marketing function. Far from it.

At its most mature, ABM is part of a larger program that coordinates all customer-facing resources across marketing, sales, finance, fulfillment, product development, service, support and partner organizations.

The core of any ABM initiative is an aligned marketing and sales team that's dedicated to large accounts. But the more sophisticated you get, the more you involve other departments in your ABM efforts.



“ABM is a strategic business initiative. If it’s only sponsored by marketing, it becomes a campaign.”

Jeff Sands  
ITSMA



## Start where you are

ABM can sound like a long, expensive, technology-intensive strategy. In truth, it proceeds in logical steps and starts with a very simple thing that you may already have: a list of target accounts.

These can be named accounts, segments you want to target, a list of existing customers or a subset of customers (for example, those up for renewal).

So don't let the growing body of ABM literature put you off. You can get to ABM from where you are now – and it doesn't take years! (Thank you Neha Jewalikar of Demandbase for this insight.)



# How is ABM different from outbound sales development?

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A well-run sales development or prospecting team has always coordinated a mix of touchpoints – email, phone, social media, etc. – to create and develop account-based opportunities.

**The new ingredient in ABM is the alignment and integration of a dedicated marketing function to mirror and support that effort.**

Craig Rosenberg, a pioneer of ABM, says it eloquently:

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“In Account Based Marketing, sales and marketing work together to create an always-on series of touches and relationship-building activities aimed at these accounts. A meeting with an account is just the beginning – not the end – of an Account Based Marketing program.

“Outbound prospecting clearly works but it’s one channel into the target accounts. The key piece that’s missing is marketing. The timing is right for the ABM movement – an aligned marketing sales strategy to solve the target account pipeline problem.”

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Well said, Craig.

**Sales has always used an account-based approach. Now marketing is getting on board.**

# How ABM is different from demand generation

Account Based Marketing differs from traditional demand generation in important ways.

## It's account-centric

As already discussed, the ABM approach is based on a fundamental shift from a lead-centric to an account-centric perspective.

## It's outbound

Demand generation at its best is largely an inbound operation – publishing content that brings a wide range of prospects into your funnel.

With ABM, you don't wait for target accounts to turn up in your lead nurturing system, you reach out to your target accounts directly. This is largely an outbound strategy, with an extended set of tactics – including account specific advertising, sales development, and direct mail.

## It's 'land and expand'

Demand generation focuses primarily on generating net-new leads and opportunities; in fact, many marketing departments don't even get 'credit' for campaign responses from existing leads and customers. In ABM, marketing and sales work together not only to land the account, but also to expand it over time. Marketing continues to work with sales after the deal is done.

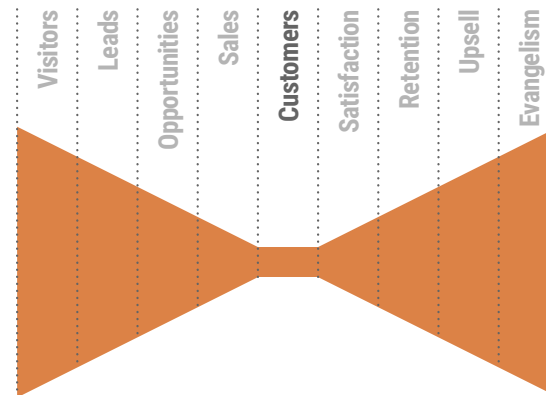
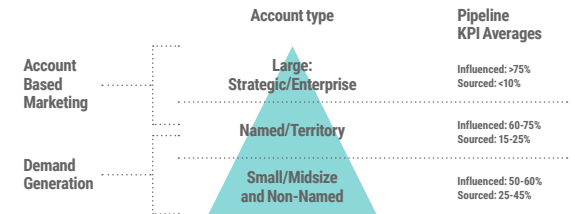
## It supports, but doesn't source, the pipeline

In demand generation, marketing sources a significant fraction of the pipeline. In ABM, marketing influences the pipeline but directly sources or discovers very little of it.

## It measures different things


Because of these differences, the way ABM is measured is very different from traditional demand gen metrics. See the Metrics section to the right for a detailed discussion.

SiriusDecisions shows that marketers source a lot of the opportunities in general demand generation but are influencers in ABM.



## Land and Expand

The Bow-tie: Focus on new customer acquisition as well as existing customer success and expansion as part of Account Based Marketing.



## Traditional demand generation is fishing with a net.

You put your content out there and start catching fish. You don't care what fish you catch, as long as you pull in enough of them every month. You then nurture and score them until opportunities come out the other end.



## Account Based Marketing is fishing with a spear.

You don't wait for a target account buyer to wander into your net. You reach out to target accounts directly – going after the big fish only. You don't get wasteful 'by-catch', focusing all your efforts on the prospects you need to reach.

**This raises the bar on the quality of your data and the relevance of your marketing. ABM is laser-focused.**

# Why ABM is so hot

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**Account Based Marketing is not a new concept. In fact, the industry body ITSMA pioneered the concept over a decade ago.**

**So why has ABM suddenly generated so much activity and attention? A few good reasons:**

## **The returns on inbound are flattening out**

Traditional 'inbound' demand generation is hitting a wall. Today, sales and marketing teams are discovering that inbound is not very good at the biggest, most complex deals. As companies look more at Lifetime Value and Customer Acquisition Cost metrics for their enterprise customers, ABM becomes much more compelling.

## **Marketing and sales are ready to work together**

The rise of marketing automation and lead nurturing have brought sales and marketing closer together than ever before. The disciplined approach to pipeline management has earned marketing the respect of colleagues in sales. And new transparency has made marketing more aware of the real challenges the sales force faces.

## **The technology is in place**

ABM has always been a viable strategy. But today, the tools and technologies are in place to make it much more scalable, including CRM, marketing automation, analytics and personalization.

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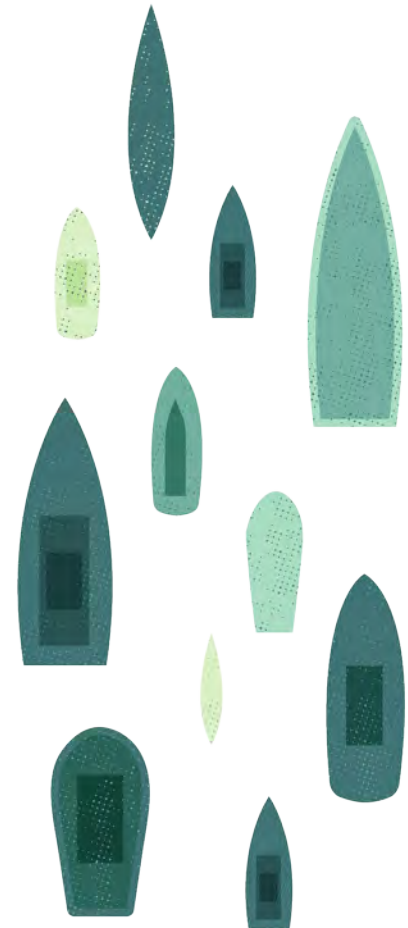
“There is a greater opportunity to take advantage of ABM because today’s technology makes it much less labor intensive.”

Megan Heuer

VP and Group Director  
at SiriusDecisions

in an interview with Demand Gen Report.

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# Why ABM is so hot (cont'd)

### Newly available data

More and more vendors are making it easy to access the data critical to account-level insight. This ranges from contact information and organizational charts to account-centric technographics and intent data.

### The analytics expertise is ready

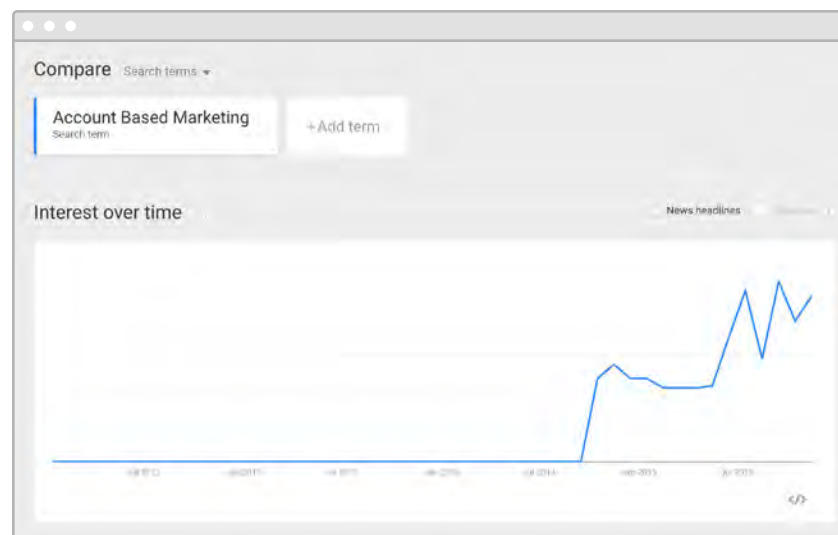
Not only is the account-level data available, the analytics teams and tools are already in place, ready to put that data to work.

### It just makes sense

Part of the reason the Account Based Marketing trend is gaining traction is because an account-centric lens makes so much sense: sales has always used an account-based approach, and now marketing is beginning to as well.

**In short, the time is right for ABM. The pent-up demand for the approach can now be fulfilled.**

Google Trends shows searches for 'Account Based Marketing' exploding.



**41%** of companies consider ABM a top priority for B2B marketing and sales

(LeanData Survey, 2014)

# Data Snapshot

## ABM momentum

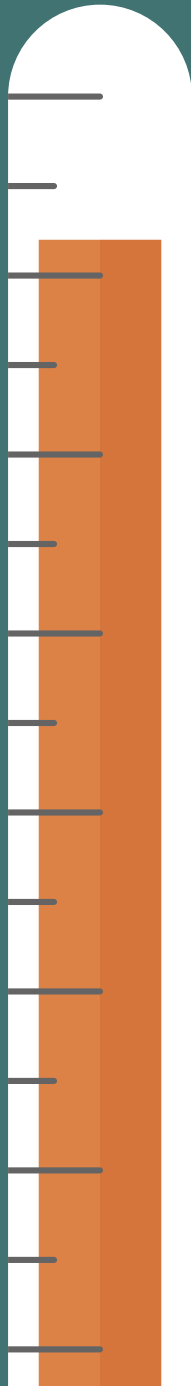
Recent research shows that the ABM market is heating up:

**A recognized need** .....  
While 92 percent of companies recognize the value in ABM, going as far as calling it a B2B marketing must have, only 20 percent have had full programs in place for more than one year — and 47 percent say their teams don't yet have the skills needed for ABM.<sup>1</sup>

**ABM starts to take-off** .....  
**71%** of B2B organizations are either using ABM, interested in adopting the strategy or are testing it.<sup>2</sup>

**Seeing results** .....  
Wider adoption is expected with more than 60 percent planning to invest in technology for ABM to better align sales and marketing over the next twelve months.<sup>1</sup>

**Pilot programs in place** .....  
**52%** of respondents currently have ABM pilot programs in place.<sup>1</sup>



**Ramping up** .....  
83 percent of ABM testers and 72 percent of ABM users have plans to increase their usage of ABM in the coming 12 months; none have plans to decrease ABM usage.<sup>2</sup>

**The alignment begins** .....  
74 percent of respondents already work with sales to define account goals and plans, and 67 percent get help from sales on account insights.<sup>1</sup>

**ABM works** .....  
**60%** of those who have employed ABM for at least a year report say that it has driven a revenue increase.<sup>1</sup>

Sources: 1. 'SiriusDecisions: 2015 State of Account Based Marketing Study',  
2. 'Demandbase/Demand Metric: Account Based Marketing Adoption Study'

## Data Snapshot

### ABM momentum (cont'd)

**“It’s clear that we’ve passed the fad phase of ABM... Now, we’re solidly in the trend phase.”**

**SiriusDecisions**

**“Account Based Marketing is red hot.”**

**Craig Rosenberg  
TOPO**

## Part I Conclusion

# ABM is here to stay

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**So that's why Account Based Marketing is quickly becoming the next big thing in B2B marketing.**

**We hope you've discovered the power and inevitability of this strategy and have started thinking about how you can apply it in your company.**

**Now it's time to talk about how to do it.**



# ABM Expert Q & A

## Jeff Sands, VP and ABM Practice Co-Lead, ITSMA



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### **You're one of the pioneers of ABM.**

#### **What has come together to make it so big right now?**

Vendors right now are looking for ways to really focus, personalize and target – and these are the three key watchwords of ABM.

It's all about choosing who's most important to you, working to gain a deep understanding of them, and personalizing your messages to them. So what you're saying will be relevant and will resonate.

Anytime I talk to people about ABM, I always refer back to those two R words, because they're the guidelines.

### **How strategic is ABM?**

#### **Can it just be done at a tactical level?**

ABM is a strategy, not just a program. In fact, we really position it as a strategic business initiative, not even a marketing initiative.

If it's just sponsored by marketing it will be perceived as just another campaign. But when you get the buy-in from Sales and the buy-in from senior executives and CMOs, it's then positioned as a strategic business initiative – a way to get above the noise and truly position yourself as the preferred solutions partner inside of your target accounts.

Those are high stakes and worthy of a strategic initiative.

### **Is ABM only for the very select few biggest accounts or can it scale up?**

The most intensive form of ABM is at the very top – the Tier 1 accounts – where a good strong ABM marketer can only handle about 3-4 accounts at any one time. It takes that much time and effort.

But ABM can also be applied to what I would refer to as Tier 2 accounts, when there may be 10, 15, 20 of those next tier accounts, that one ABM marketer is going to be working with – that's a 'one to few' kind of environment.

They may all be Tier 2 healthcare providers or healthcare payers and because you know they're all in the same market they're all facing the same challenges. So you can still target and you can still focus, what takes a little more effort is the personalization and that is where some of the marketing automation tools can really help.

So if you're holding a seminar around a certain topic, instead of just inviting people from one account you invite the same level of people from maybe 6 or 7 accounts. But the content is still going to be relevant to them and it's still going to resonate with them.

### **This targeted approach sounds like best-practice selling. How is ABM different from, say, The Challenger Sale?**

You're right, Sales is off knocking on doors, having conversations and trying to establish some sort of relationship with people inside of their targeted accounts.

But the conversations in the past have been strictly focused on products and solutions. What our research shows is that decision-makers want to talk to the salespeople and subject matter experts early on in the process when the problem is first recognized. We call this the 'epiphany' stage and it's really where we push targeted and focused and personalized thought leadership marketing that then sees salespeople continuing the conversation.

We refer to it as thought leadership selling and it means Sales and Marketing are joined at the hip, right from the beginning – developing content, crafting strategies and messages. Then the salespeople can go in and have conversations about the client and NOT about them. And that's the big difference.

## ABM Expert Q & A

### Jeff Sands, VP and ABM Practice Co-Lead, ITSMA (cont'd)



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#### **Why is alignment so central to ABM?**

If you take a step back, there are three processes going on at the same time:

#### **The client is going through their buying process**

They've encountered a problem, so they talk to peers and analysts, they do Google searches, then draw up a shortlist and, ultimately, make a decision.

#### **Your sales team is going through a selling process**

They're making calls, knocking on doors, setting up meetings...

#### **Your marketing team is off doing its thing**

They have their editorial calendar, events calendar, marketing programs, seminars, content and advertising...

The challenge is that all three of these processes are misaligned. What ABM tries to do is get them in total alignment.

So that if salespeople are going to call on somebody and marketing is going to have an event they're going to touch the client at the appropriate time in their buyers journey.

Our research shows even though marketing campaigns and content may be relevant, they're often touching prospects at the wrong time.

They're not ready to hear that message, so it is just a wasted effort.

ABM aligns all of that so there's no wasted time in anybody's process.

#### **Are there any dimensions you see as especially important for account selection?**

In our workshops, we help clients look at all the factors that might indicate an account's propensity to buy, and then score these.

Two that are maybe not immediately obvious but that I like to introduce are: 'Is the account in a growing market?' and 'What's the attitude of the account rep on this account?'

We always prefer to target companies that are in a dynamic, growing market. It's far more likely to turn into business than an account in a shrinking market.

The other one is really an interesting one: 'What's the attitude of the account manager?' If the account manager says, 'Listen I've been successful in my account for years, I'm making a lot of money, I'm not sure what good this is going to do me,' then your chance of success with ABM is limited.

If it's somebody who's always willing to try something new; who knows there are always other ways, maybe better, more efficient ways to gain entry into the account and they're willing to try and work with you: that's a great starting point.

#### **What about personalizing ABM content? How focused does it get?**

Most of our clients have a huge portfolio of marketing assets but most of them are produced by services or solutions marketing. So we always start with what they have already.

We then do a workshop process where we go into that content and personalize it. Sometimes there are only a few things that you want to change, sometimes its a graphic, a title, it might even have the company name in the title.

You might just change the opening paragraph so that it begins with their business and their issues, and their challenges. Then you change the last paragraph which are often the benefits and the differentiators.

In some cases we even personalize it to the individual – we can even get down to that level of personalization.

## Part II

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# The 6 ABM processes

# The 6 ABM processes

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ABM is very much an evolving practice and it will progress differently in different organizations.

But when you look at the most successful ABM practitioners, a pattern emerges. Most ABM journeys follow a familiar, six-step process:

- 1 Select accounts**  
Align sales and marketing around a list of target accounts and existing customers that are most likely to deliver revenue.
- 2 Discover contacts and map to your accounts**  
Fill out these accounts and buying centers with specific contacts based on your ideal buyer profiles.
- 3 Develop account insights**  
Learn as much as you can about each account so that your interactions are always relevant and resonant.
- 4 Generate account-relevant messages and content**  
Create or adapt content and messaging that reflects your account insight and is targeted specifically at the buying teams in each account.
- 5 Deliver account-specific interactions**  
Manage targeted interactions that are personalized for each account.
- 6 Orchestrate account-focused plays**  
Synchronize interactions into coordinated plays that align to account plans and goals.

Let's take them in turn...

# 1. Select accounts

The whole point of ABM is to focus your sales and marketing efforts on a relatively small number of high-value accounts that have the greatest revenue potential.

**That's why account selection is the most important step in any ABM program.**

Get this right and you'll get the maximum return on the next six steps in the ABM process. Get it wrong and you'll either miss major opportunities, waste resources on the wrong accounts or both.

.....

"It's incredibly important to pick your accounts wisely," says Sam Laber, of sales intelligence company Datanyze, "You're only going to have the bandwidth to effectively work a certain number of accounts. And if you pick the wrong ones, you're going to be wasting your team's time on leads that won't amount to anything."

.....

**Aligning Sales and Marketing on target accounts is to ABM what defining a marketing-qualified lead is to demand gen – the most foundational thing you can do.**

## The goal of account selection

The goal of the account selection process is to optimize your sales and marketing resources – time, headcount and budget – by focusing them on the accounts most likely to drive big revenue.

Taking shortcuts during the account selection process incurs penalties throughout your ABM program, chiefly:

### Missing out on deals you could have won

If you leave prime candidates off of your account list, you're needlessly ceding big deals to the competition.

### Wasting effort on a poor fit

Put the wrong accounts on your list and you'll spend time, money and effort on low-potential opportunities while under-resourcing your best shots.

That's why it's so important to invest up-front in a serious effort to align sales and marketing around selecting the very best accounts.

## Resourcing for success

ABM is not just about picking the account list. It's also about **aligning on the proportion of resources that will focus exclusively on that list.** If you're putting 100% of your marketing effort into the top 100 accounts, make sure you've built a model that shows how those 100 accounts will help the whole company meet its growth goals. If those 100 target accounts get 50% of resources, then it should deliver 50% of goals, and so on.

# Create tiers for ABM accounts



## Taking a tiered approach

The term ABM is used to refer to a wide range of strategies, from the most intensive (aimed at a handful of mega-accounts) to the highly scalable (aiming at up to thousands of smaller accounts – but still taking an account-based perspective).

Your ABM program may focus on one specific tier or might combine strategies and activities for each tier. But thinking about account sizes and numbers in this way will help guide your thinking about resource allocation, level of automation and impacts on scalability.

We recommend thinking about your own ABM efforts in tiers:

Tier	Number of accounts	Tactics
1	20-50 [Tens]	<ul style="list-style-type: none"> <li>• <b>Account Plans</b></li> <li>• Deep research and 1:1 personalization</li> <li>• Sales + SDR + marketing + executive support</li> <li>• Targeting lasts for months / years</li> </ul>
2	~200 [Hundreds]	<ul style="list-style-type: none"> <li>• <b>Segment Plans</b></li> <li>• Industry / solution / persona level personalization</li> <li>• SDR (phone + email + social) + Marketing (ads + direct mail + events)</li> <li>• Multi-touch over weeks</li> </ul>
3	1000s [Thousands]	<ul style="list-style-type: none"> <li>• <b>Solution Plans</b></li> <li>• Limited personalization</li> <li>• Inbound (marketing qualified accounts)</li> <li>• Targeted outbound in waves</li> </ul>

## Types of ABM deployed today:

- 77% named account
- 58% large account
- 48% vertical (industry)-based account
- 39% segment (eg. role)-based account
- 17% customer lifecycle

Source: SiriusDecisions 2015 State of Account Based Marketing Survey

# The art and science of selection

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Effective account selection combines gut feel, historical performance and sometimes predictive data science to come up with an “Ideal Customer Profile”.

The questions that guide the process include:

- Where have we sold most effectively in the past?
- Which kinds of accounts have proven most profitable over time?
- Which sub-industries do we work with today?
- What characteristics are most predictive of sales success?
- What attributes make for the best fit with our product?
- What traits should rule out an account?
- What kind of accounts play best to our unique strengths?
- Which accounts do we already have an advantage in?
- What accounts deliver the most value (including strategic value)?

There are different ways to answer these questions, but they fall broadly into two approaches:

## 1. Manually pick your targets

## 2. Use predictive analytics

**But before we look at these, let’s look at the role of data in your account selection process.**

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“The two core criteria we look for when selecting accounts for ABM:

1. Is the market growing, and
2. Is the account manager committed to this?”

Jeff Sands  
ITSMA

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# Using data for account selection

Whether you go the manual or the predictive route, data must play a critical role in your account selection process.

## Four data inputs

The kind of data inputs that are most important for your company will depend on many factors, but your process will almost certainly look at four data inputs:

- Firmographics
- Technographics
- Intent Data
- Engagement Data

## Firmographics

What company characteristics best predict a successful sales process?

Chances are, you already have a pretty good idea about the kinds of companies most likely to deliver the big deals that justify the ABM process.

Firmographic dimensions might include:

- Company size
- Number of employees
- Industry
- Growth
- Number of locations

And your data sources will include:

- Annual reports
- LinkedIn
- Third party data vendors, such as Dun & Bradstreet and Reachforce

Firmographics will form the foundation of your account selection process – but it's only a starting point, not the end.

## Technographics

What technologies do they currently use or are they looking to invest in?

Knowing that a company uses Marketo, Salesforce or SAP might make them a much more attractive candidate for your solutions. Adding technographics to your firmographic data will further focus your ABM efforts.

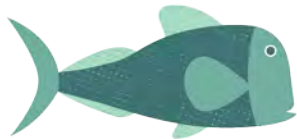
Dimensions might include:

- Complementary technologies to yours
- Tech that rules out your solution or makes investment less likely

Data sources include:

- Desk research: looking at forums, job boards, social media, etc.
- Competitive intelligence firms – like HG Data
- Web scraping – with firms like Datanyze and BuiltWith

For some companies, technographics will be the single most important driver of the account selection process. For others – where complementary technologies are not important indicators – they will play a minor role.





# Using data for account selection (cont'd)

## Intent Data

Is the company showing signs that they're in the market right now for solutions like yours?

Intent data includes any behavioral data that suggests that a company or buying team is actively seeking solutions like yours right now.

.....  
"If you have an account in which for the past few weeks, multiple contacts have been researching a new phone system and downloading white papers about new phone systems, that not only tells you if they meet your buyer criteria, but it tells you they're in the market now."

Alison Murdock  
6sense  
.....

Intent data might include:

- Topics people at this company are researching on 3rd party sites
- Participation in forums
- Content downloads or ad clicks

Data sources include:

- Forums, job boards, etc.
- Intent vendors like Bombora, MRP, and The Big Willow

.....  
"All enterprise IT vendors sell hard to the same 5,000 companies. So intent becomes key: get to them when they're actively thinking of your kind of solutions."

Henry Schuck  
DiscoverOrg  
.....

"Yes, you need to look for intent signals. But I'd hate to try to build a predictive model on it exclusively – there's just not enough of it in the market compared to companies that fit and companies you're already engaging with."

J.J. Kardwell  
EverString  
.....

# Using data for account selection (cont'd)

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## Engagement Data

How engaged is your company with this account right now?

When selecting from a long list of potential target accounts, it makes sense to consider companies where you're not starting from zero. Taking into account your current level of engagement might tip the scales in favor of one company over another.

Dimensions include:

- Past sales into the company
- Rep activity levels
- Account engagement by persona
- Current coverage of key decision-makers
- Existing relationships and connections into the account
- Executive entry points

Sources include:

- Your CRM data
- Web analytics
- Marketing automation reports
- LinkedIn
- Engagio
- Sales rep activity
- Executive input

Engagement data is an important part of your account selection methodology. But it's unlikely to expose 100% of your high-potential accounts. In general, use it to prioritize from a longer list rather than to supply your entire list.



# Putting the sources together

The four data sources discussed above are critical inputs whether you use a manual account selection process or a more automated approach using predictive analytics.

Let's look at how you might put them together.

## Manually picking your list of target accounts

The simplest way to select accounts for ABM is to let the sales reps draw up their own lists and combine them into a master list.

In general, this list won't be wildly off base – reps know their markets (and they'll have immediate buy-in to the outcome). But, without further analysis, it will almost certainly miss some big opportunities and overvalue others.

## Supplementing what you know

Going the manual selection route doesn't mean you have to assemble all the relevant data yourself.

You can still enhance your own data about prospective accounts with data purchased from third-party vendors, like Dun & Bradstreet (and their acquisition, NetProspex), Data.com (Salesforce), DiscoverOrg, ZoomInfo and InsideView.

The Sales Intelligence market has grown enormously in both sophistication and coverage in recent years. That means it's easier than ever to collect timely, relevant and detailed data about the companies you're considering for your ABM efforts.

## Manual scoring

Applying a bit of methodology will help ensure your process is more rigorous and therefore more predictive of success.

### Start with the entire market or territory, then score each account according to the dimensions most relevant to your situation.

You can create a simple scoring model by weighting the inputs your team decides are most important – including firmographic, technographic, intent or engagement dimensions – then scoring each company.

In this admittedly over-simplified model, three key dimensions are scored on a scale of 1-10, with the score being multiplied according to the weighting of each dimension.

In this example, Company A and D made the cut.

Tier	Co. size (x2)	Have right CRM (x5)	Engagement (x1)	Score
Company A	10 (x2=20)	8 (x5=40)	10 (x1=10)	70
Company B	3 (x2=6)	1 (x5=5)	0 (x1=0)	11
Company C	10 (x2=20)	2 (x5=10)	5 (x1=5)	35
Company D	10 (x2=20)	10 (x5=50)	7 (x1=7)	77

# Use Predictive Analytics to identify your target accounts

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In the real world, many factors contribute to a successful sale – and many of them will be invisible to your teams.

**Predictive Analytics is a way of processing far more data than humans can process and using it to build models that better predict the propensity to buy.**

For many ABM practitioners, automated, predictive techniques can significantly out-perform manual selection and scoring.

The majority of ABM programs have a list of targeted accounts in the 500 to 2,000 range, so that’s still a lot of activity to track manually. Predictive is one thing that enables companies to scale their ABM efforts, something which was not possible even a few years ago.”

Megan Heuer  
SiriusDecisions

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“For million dollar deals and up, you might identify your 200 best accounts up-front and then map them out and go deep. You might use Predictive Analytics once to discover the right 200.

“For deals that aren’t that big, you’d use Predictive Analytics to supply a constant flow of accounts to target, finding new ones to replace those that close or fall away.”

J.J. Kardwell  
EverString

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# How predictive scoring works

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Predictive Analytics takes data about accounts that have progressed to a certain stage of the buying process, and uses it to highlight other accounts in your market that most look like these.

Predictive models will often include all the firmographic, technographic, intent and engagement data that you might use in a manual scoring model. But the data will include many more dimensions and data points – often in the hundreds or even thousands. In fact, a big part of the value of predictive vendors is they do the data collection and cleansing work for you.

Predictive models don't go in with any biases or hypotheses. They simply analyze the data, building the model around any characteristics that best correlate with eventual success.

**Just as Netflix predicts which movies you'll like based on the ones you already liked, Predictive Analytics chooses the companies most likely to buy by analyzing the ones who have already bought (or have become opportunities).**

“Predictive Analytics looks at indicators at a level that humans just can't understand. It's not realistic to expect that you will come up with your best target accounts simply by having sales, marketing and product sit in a room. This reduces so much friction and allows everyone to feel like you're making data-based decisions instead of having people bickering around a table.”

J.J. Kardwell  
EverString

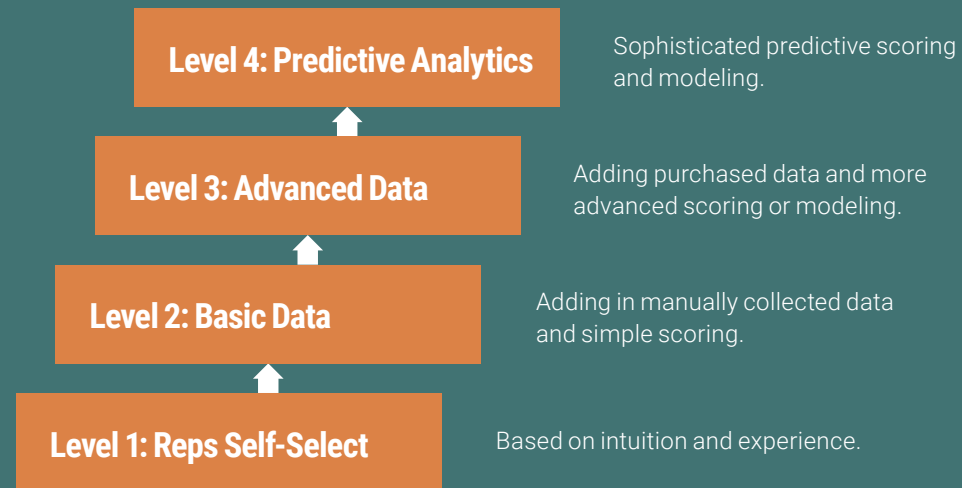
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# An Account Selection Maturity Model

At Engagio, we think about Account Selection using a four-stage maturity model.

You can start with the most basic approach – letting sales reps draw up their target list – and still get real value from ABM.

But the more data you bring in and the more sophisticated your modeling, the better your chances of optimizing your resources by laser-focusing them on the accounts with the highest propensity to buy.



The ABM Account Selection Maturity Model starts with simple sales rep selection and progresses through to full predictive analytics.

# How many accounts should you have?

The right number of accounts in each tier of your ABM program will depend on many factors, including:

- Your expected deal sizes
- The length of the sales cycle
- Your available sales resources
- Your current level of engagement with major prospects
- The intensiveness of your ABM strategy

Then it's a matter of applying your available resources intelligently.

“The challenge is to scale your ABM program so that you can address internal requests from the sales team, but at the same time not lose the unique approach of ABM and revert back to the traditional kinds of marketing,” says Jeff Sands of ITSMA, “Salespeople are highly competitive, and when they start to see their peers succeed in implementing a strategy like ABM, they want to jump on that bandwagon really fast. You have to make sure you scale appropriately.”

## A sample calculation

One approach is to start with the available selling time for each sales rep:

**75% selling time x 2,000 hours a year = 1,500 hours**

You can then apply those hours to the estimated time required to cover the different size accounts. For example, if you decide that your selling times look like this:

### Global Enterprise

250 to 750 hours per account per year

### Named Account (Large)

75 to 250 hours per year

### Named Account (Average)

30 to 75 hours per year

### Smaller Accounts (Non-named)

10-30 hours per year

You'd see just how many of each size account your 1,500 hours can support:

**2-6 Global Enterprises**

or

**6-20 Large Named Accounts**

or

**20-50 Average-Sized Named Accounts**

or

**50-150 Small Named Accounts**

Or any combination of these sizes that don't exceed 1,500 selling hours per sales account representative.

“The right number of accounts per rep varies widely based on things like average deal size and the dynamics of the sales cycle. We've seen 200 accounts per rep and 10 accounts per rep.”

J.J. Kardwell  
EverString

# Account selection worksheet

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Use this to help you decide how many accounts you target, by tier:

### Your sales resources

- A) Number of salespeople .....
- B) Avg hours per year [Suggest: 2,000] .....
- C) Available selling hours (AxB) .....

### Your selling demands by tier

These can be ranges

- Global Enterprises – ..... hours per account per year
- Named Accounts (Large) – ..... hours per account per year
- Named Accounts (Average) – ..... hours per account per year
- Smaller Accounts (Non-named) – ..... hours per account per year

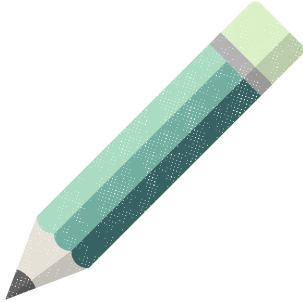
### Your account count by tier

Now 'spend' your available selling hours (C) across your tiers:

- ..... Global Enterprises
- ..... Named Accounts (Large)
- ..... Named Accounts (Average)
- ..... Smaller Accounts (Non-named)

### Health Checks

- Are you investing too high a percentage of your resources in too few accounts?
- If reasonably successful, will these wins deliver the numbers your business needs?
- Are you spreading your resources too thinly? Could more focus deliver better results?





# Be patient

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**ABM efforts take time. Once you've chosen your list of target accounts, stick with it for longer than you may feel is right.**

**Sales reps may overreact to bad news and want to take an account off the list. But persistence can pay off. Just because an account is not ready to buy right now doesn't mean they should be removed from your ABM program.**

**Tip: don't turn over more than 25% of your list each quarter. If your turnover is greater than that, you may be abandoning the ship too quickly.**

**As LeanData says, "Once you've selected your target accounts, don't waver in your resolve and start to chase new targets. Companies with faster sales cycles should assign new targets on a quarterly basis. Businesses with longer sales cycles might reassess twice a year."**

# ABM Expert Q & A

## Rishi Dave, CMO, Dun & Bradstreet



Rishi Dave is both an experienced ABM practitioner – from his time at Dell and now at D&B – and, now, an important vendor in the ABM space. So we asked him to put on different hats for this Q & A:

### **As an ABM practitioner**

#### **How are you applying ABM to your own sales and marketing efforts at D&B?**

ABM is central to our strategy for driving pipeline. We use data, analytics and collaboration with sales to prioritize opportunities. Once we've done this, we architect personalized experiences on- and offline at various levels of scale depending on the opportunity within the account. Then, we measure it closely, learn, and optimize.

#### **From your experience at Dell and now D&B, what would you say is the key to success in ABM?**

Excellence in operational execution and measurement. You have to allocate your resources well and execute tactics flawlessly and at a high quality to make an impact. Through measurement, you learn what works and what to optimize.

#### **Does this require a lot of culture change? What does the transition look like?**

It does. We actually focused on culture first before scaling ABM. No matter how good your ABM or digital machine is, if you don't have something

differentiated to say and a culture that supports it, you will not break through the clutter. We started first by developing purpose and values and then a creative expression. We then developed a messaging system around personas that linked this to the pain points we solve for customers. This all laid the foundation for our ABM strategy.

### **As an ABM vendor**

#### **Why is data so important in Account Based Marketing?**

Data and analytics help you prioritize accounts and measure success. Modern marketing is dependent on data and analytics for targeting, nurturing and closing opportunities. Data also gives you the complete picture of the account that lets you execute the right tactic at the right time.

#### **In selecting accounts for an ABM program, what kind of data is the most important?**

It all depends on the company and what data and analytics models have demonstrated predictive value in the past.

Companies often start with integrating the data across the enterprise and its silos and then leveraging it to build models that estimate demand and opportunity within accounts. Typically, people will start with firmographic data and then move to demand estimation models.

We're fortunate at Dun & Bradstreet to have access to the same data and analytics capabilities we develop for our customers. We use propensity and attrition analytics models to tell us who is most likely to grow their relationship with us and who poses a potential risk of not renewing. Demand estimation models based partly on look-alike modeling tell us where we have opportunities in different lines of business and with which accounts.

#### **How important is it to integrate your data sources with sales and marketing platforms like CRM and marketing automation?**

It is critical. We embed our data into world-class cloud-based platforms so customers can use Dun & Bradstreet data turnkey in the apps and processes that matter most to the way they work. They can supplement and clean their data to develop more personalized experiences for their customers and prevent dirty and duplicate data that leads to lost opportunities and bad customer experiences.

## 2. Discover contacts and map to your accounts

The next step after account selection is discovering the right contacts within every account and mapping their relationships.

“The quickest growth opportunity? Grow the number of contacts per account.”

Jason Jue  
Triblio

### Where to find contacts and enrich your data

There are many sources of contact data, including:

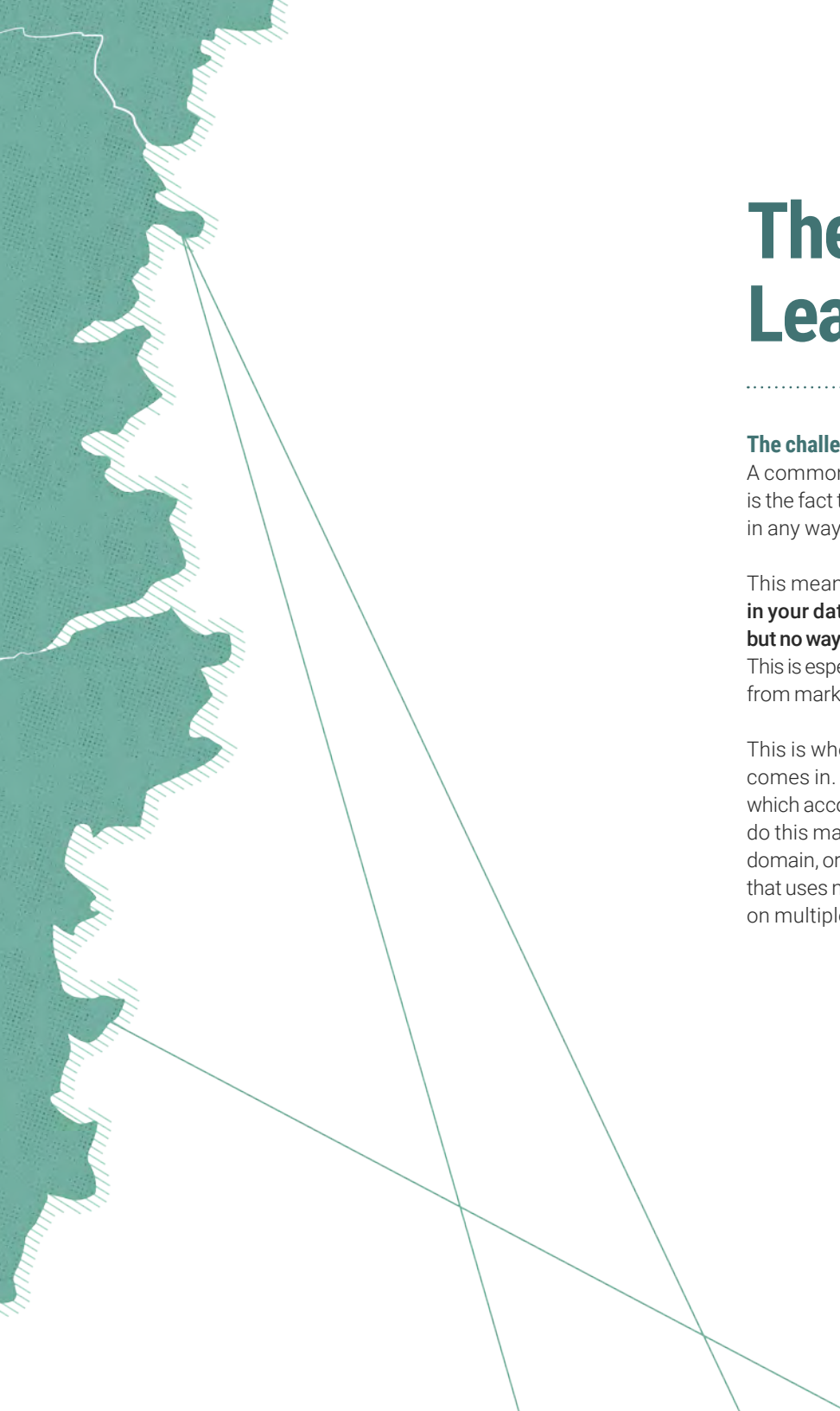
- **Your existing data** – living in your CRM, Marketing Automation or ERP systems.
- **Desk research** – manually scraping sources such as LinkedIn, media or event websites, industry forums and social media channels.
- **Call programs** – having Sales Development Reps call into the account to build out contacts.
- **List-building partners** – an easy way to supplement your data and add it to your contact profiles in your CRM (see Datanyze and SalesLoft Prospector).
- **Email conventions** – if you know a company uses “first.last@company.com”, then you can figure out email addresses when you only have names.
- **Purchased contact data** – buying laser-focused lists from reputable data providers such as ZoomInfo, RainKing, Netprospex, LeadGenius and so on – DiscoverOrg even provides organization charts filled with contact data.
- **Predictive personas** – some predictive vendors, like Leadspace, will determine the personas most likely to buy and supply more like them within your target accounts.

### Who collects the contact data?

For your largest accounts, marketing should play a key role in sourcing contacts to fill out org charts in target accounts – often sourcing from outside vendors.

For the next lower tiers of accounts, your Sales Development Reps might take on the job of contact capture, maybe in advance of a big calling campaign.

Whatever route you choose, sales, marketing and SDRs need to work together to make sure you’ve got maximum coverage within every target account.



# The challenge of Lead-to-Account matching

## The challenge of Lead-to-Account matching

A common challenge in Account Based Marketing is the fact that Leads in Salesforce are not connected in any way to the Account object.

This means you might have **hundreds of people in your database that work at your target accounts, but no way of tying their activity to the right company.** This is especially a problem when bringing in new leads from marketing programs (such as a tradeshow list).

This is where Lead-to-Account (L2A) matching comes in. With it, you take each lead and identify which account he or she should be part of. You can do this manually using a simple match on email domain, or automate it with technology like Engagio that uses more sophisticated “fuzzy logic” matches on multiple dimensions.

Once you’ve made a match, you can make the connection for the purposes of ABM programs and metrics, while keeping the record as a Lead (which maintains all your existing lead processes). Or you can explicitly convert it to a Contact in the account. Either way, getting this right is a critical step in all ABM programs.

# A persona-based approach

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In Account Based Marketing, you'll be targeting messages and content to specific members of the buying team by role and seniority (as well as other dimensions).

That means building detailed personas that represent each key member of the buying team – probably 3-5 personas.

You'll also want personas that might not be as detailed for the second and third tiers of influencers; the people who may not be on the buying team but who may have a significant influence in the buying process.

You don't want to let a deal come undone at the last minute because you completely ignored a key constituency (e.g. nursing staff at a hospital).

“When I'm talking to a VP of sales, my messaging has to be different than when I'm talking to a manager of inside sales. Knowing those roles, and mapping messages to them, is critical for an Account Based Marketing strategy.”

Henry Schuck  
DiscoverOrg

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## Data quality matters

Data quality is too often neglected in marketing in general. In ABM, it's especially important. With such high-value contacts, you don't want to waste money sending expensive, 'dimensional' direct mail twice to the same person – or, even worse, look stupid by personalizing a letter with the wrong facts.

Maria Pergolino of Apttus tells the story of a sales rep that kept notes about contacts in the 'first name' field in the CRM system. Imagine getting an email addressed to “Dear Mike (hates us)”!

Investing in data quality processes and tools could save you time, money and embarrassment later, by removing duplicates, validating address information and standardizing company names.

### Tip: Whitespace analysis

Look at how many contacts you could have compared to the contacts you actually have. This 'whitespace' analysis tells you where you need to focus your list building efforts.

# A (no-doubt partial) landscape of contact data sources

Some of the many sources of contact data available to account based marketers:



## Manual



## Purchase



## Predictive



Representative companies;  
not exhaustive

# 3. Develop account insights

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**ABM works because it lets you invest more of your limited resources in the biggest accounts that are most likely to buy.**

The entire strategy depends on doing your homework and learning as much as you possibly can about target accounts (and key buyers at those accounts) so you can **maximize your relevance and resonance within each.**

Leveraged properly, account-specific insight will have a dramatic impact on every engagement:

- People will be more likely to open and read your emails.
- They'll consume and share more of your content.
- They're more likely to attend your events and webinars.
- They're more likely to take and return your sales or account development calls.
- Your sales and customer meetings will be more productive and effective.
- Your sales and cross-sell cycles will be accelerated.

That's the power of relevance and resonance – and that's why insight is so critical to ABM success.

## The new outbound

Insight-driven ABM applies the best concepts from demand generation to targeted, outbound prospecting:

- **It's content driven** – not product-led.
- **It's helpful and valuable** – providing real utility to the audience.
- **It's focused on the buyer** – not your company's agenda.

Approached this way, your ABM interactions are personalized and super-relevant – and that's what opens doors.

**ABM is an outbound activity. You need to knock on people's doors. Without insight, these efforts are no better than cold calling. Powered by relevant messages and content, you can open doors and build relationships.**

50% of customers are more likely to purchase from a vendor when they personalize their sales and marketing materials to a customer's specific business issues.

ITSMA survey, 2014

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Let's look at the **What, Where** and **How** of ABM insight generation:

# What kind of insight are you looking for?

You need to know as much as you can about:

## The target account's market

The market dynamics, news, trends, growth drivers and inhibitors, M&A activity...

## The target company

Their stated strategy, their strengths, weaknesses, opportunities and threats; competitors (and which similar companies use your solution already); their org chart and unique buying centers; which buying centers own your products, which own competitors' and which are open (whitespace analysis); any recent sales triggers (new funding, new hires, etc.); their culture and values...

## The target personas

The agenda of each member of the buying team; their priorities, prejudices, preferences, styles, tactics; where they've worked in the past (and what systems that company used)...

## The relationships inside the account

How each key contact relates to the other members of the team; who reports to whom; who holds budgets; which are the influencers, blockers, mobilizers, enablers...

## Your connections to the account

Your existing connections to the key contacts; previous deals; customer service experiences; your experience with their close competitors; LinkedIn connections to people you know; university or past company ties...

Insight at each level will translate directly into relevance and resonance, which drive engagement and, ultimately, deal success.

.....  
"I want to know what the VP of HR has for lunch."

HR Software vendor  
.....



## An ABM Account Insight Checklist

The information you need to collect

### The Market

- Industry dynamics
- Key trends
- Competitors
- Growth drivers and inhibitors

### The Company

- Financial health
- Growth areas vs. 'cash cows'
- Renewal risk
- SWOT
- Initiatives and organizational priorities
- Triggers (funding, acquisitions, personnel moves, etc.)

### The Buying Centers

- Org chart
- Key buying centers
- Whitespace within buying centers

### Relationships and Connections

- Key contact profiles
- Relationships to each other
- Relationships to your company (relationship map)
- Attitudes, preferences, biases



# Where your insights will come from

As an ABM practitioner, you'll use a wide range of sources to build up a complete picture of the target market, account and persona:

**Direct conversations** – captured by your SDRs, salespeople and event staff.

**Existing connections** – someone in your company – or inside your partners, suppliers or customers – may have deep experience with the account or the people in it.

**Social media** – the information people share on social media can be pure gold; it's timely, relevant and personal. Monitor LinkedIn profiles, Twitter feeds and participation in online forums. Social monitoring tools can help.

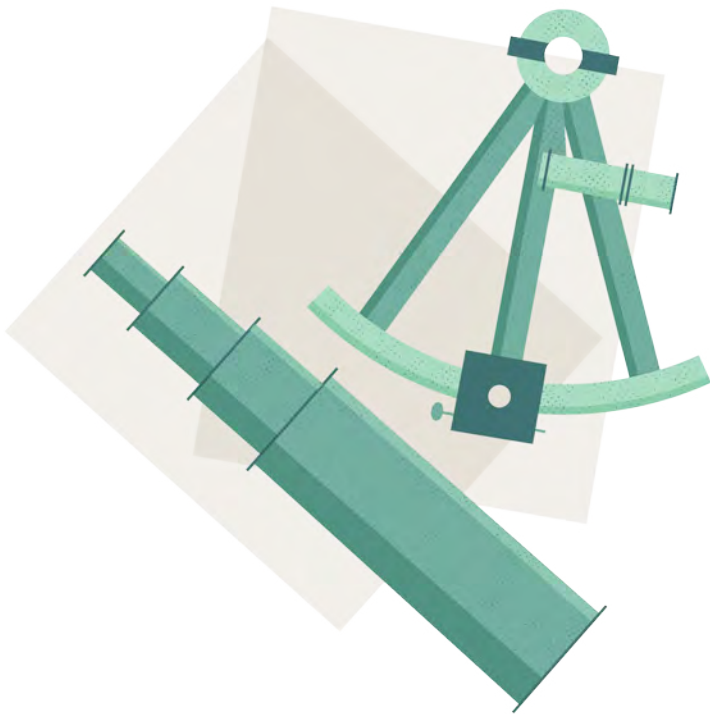
**Official company information** – annual and quarterly accounts, letters to shareholders, investor calls and every page on the website are all solid sources of insight (it's surprising how little they're consulted by salespeople).

**Blog posts** – more and more senior executives are blogging, either on the company site or on other industry forums. Always read their posts and capture the insight.

**Market data** – articles and analyst data on the market and competitors give you essential context for your messages.

**The content they consume** – seeing what blog posts, articles and eBooks a prospect reads tells you a lot about their current interests. Track this on your own site with marketing automation, and vendors of 'intent data' can help you track it off your site.

**Surveys** – when in doubt, ask. Run your own surveys to find out what you don't know and to validate what you do. Or leverage existing surveys to add credibility and weight to your messages.



# How you can generate your insight

When it comes to ABM insight, there may be some shortcuts but there's no substitute for hard work.

One of the biggest challenges is to scale your insight generation efforts appropriately, so you can focus your efforts where they'll make the most impact and automate when it makes sense.

## Set insight goals

Insight can stagnate without goals. Agree on some targets and metrics to keep the machine whirring:

- Number of new profiles per quarter
- Profile updates per month
- Account updates per month
- Org chart completion percentage
- Relationship map completeness, etc.

## Tier your insight program

You can't throw the same intensity of resources at a smaller, non-named account as you can for your biggest enterprise accounts.

### Tier 1

- Full account profiles
- Quarterly updates
- Dedicated insight team per account
- Internal Slack or Chatter group per account
- Weekly snapshot alerts per account
- Supplement as needed via data partners

### Tier 2

- Basic profiles: 3 facts for selling in under 3 minutes (a tip from Vorsight)
- Annual reviews
- Supplement with lower-cost sources and data enrichment partners

### Tier 3

- Map key pains by industry or segment
- Know competitors and their product usage
- Possibly automate insight collection using data partners

## Identify your insight resources

Insight generation has to be somebody's job or it's nobody's job. Consider these tips:

- **Compensate** – incent your SDRs on insight collection metrics
- **Offshore** – hire talent to complete and enrich your insight base; use Mechanical Turk to assign repetitive tasks...
- **Outsource** – your insight collection (from vendors like BAO or Salesify)
- **Purchase** – buy whole org charts (DiscoverOrg), CRUSH reports from Avention (for IT only); Sales triggers and insights (InsideView, Agent3) – see the Mapping Contacts to Accounts section above for more vendors

**You're going to have to spend some money to be really good at Account Based Marketing. It's worth it: these are the accounts that will make you the most money.**

# How you can generate your insight (cont'd)



The three most important factors in shortlisting and making a final decision on an enterprise sale:

1. **Knowledge and understanding of my unique business issues**
2. **Knowledge and understanding of my industry**
3. **Fresh ideas to advance my business**

ITSMA survey, 2014

## Activating your insights

Generating insight isn't enough. You need to activate that insight by getting it into the right hands and translating it into action. Here are some insight-sharing tips:

- **Create an ABM Insight Factory** – with a dedicated team of researchers [see sidebar]
- **Spin up an Insight Base** – using a web collaboration tool or intranet
- **Issue regular update reports** – highlighting new insights or developments
- **And ad hoc alerts** – for breaking news that can be acted on
- **Integrate insight into your CRM profiles** – or your ABM management tool

## Scaling insight

One company we work with has a four-person team that creates Value Hypothesis documents for each of their 1,400 target accounts, including:

- What they think the account should be worried about
- Examples of similar companies that they've helped
- Content they've researched about them (e.g. quotes from their CEO)
- Entry points – content or messages that can be sent directly to start dialogs

These are customized by account but can be based on segment-specific templates.

# Social insights

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## Craig Rosenberg's tips for social media insight

“Social intelligence tends to be the best intelligence. The information someone shares on social media is something they care about and can make for easy connections. You can truly personalize the message with this kind of information. ‘Congratulations on your recent product launch’ or just something in their LinkedIn profile. Someone once got me with the following message: ‘I just read your blog and decided ‘I have to talk to this guy’. I work with incredible entrepreneurs like you, too...”

“ABM also gives social teams an ideal mission. Go to your social media manager – who may have been tweeting out generally – and say, ‘Give us Microsoft insights and deliver content to 2,800 Microsoft marketers daily.’ That’s a great social brief.”

## Quick tips:

- If the prospect is on Twitter, follow them and retweet or quote their tweets with a comment. Everyone likes to be retweeted.
- Consider putting a personal message in the retweet. If you have a great piece of content that ties with their content, forward it to them.
- If the prospect is on Facebook, like a status update.
- Use LinkedIn InMail as a touch in prospecting – it often out-performs email.
- Keep your own social profiles strong – and make sure each SDR and sales rep has a complete and up-to-date profile. Heat maps show that the headline, photo and summary are the most viewed.

Thanks Craig!

### **Any insight is better than no insight**

One company, Network Hardware Resale, lifted email conversion rates simply by mentioning the local weather in the opening sentence!

# ABM Expert Q & A

## Megan Heuer, VP and Group Director, SiriusDecisions



### How can marketers scale the insight generation needed for ABM?

The first thing is to understand how your accounts are segmented, because there's a different level of insight needed for major strategic accounts, versus, say, a broad base of mid-market or SMB type accounts. Then for each of those account types there will be different insights required to prioritize focus and determine what actions to take. This is the idea of account personas, where you understand the different sizes and types of accounts in your audience and build from there.

With segmentation in place, the next step is to use tools to automate insight gathering and analysis. You need technology that helps you bring together a bunch of different data sources and serve it up in a way that helps Sales and Marketing make good choices and timely responses.

In addition to automated data feeds, there's also a role for traditional phone-based insight collection. Generally this works better with a third-party doing it, rather than inside tele functions. Companies who do this type of profiling on a regular basis get more information about the accounts than an internal business development team can get.

### Is content creation a major burden in ABM?

It's only a burden if marketing hasn't done the work to improve content strategy and is too focused at the top of the funnel.

It's a must to tune content development to buyer needs and all buying stages (not to mention customer needs and post-sale lifecycle stages, but that's for another discussion), and to target the types of accounts that sales wants to reach.

Smart marketers have already started to develop a content agenda that maps better to buyer personas and buying stages. Some also layer in industry or other account-type considerations. These content inventories, when done right, are a starting point to build what's needed to reach the right contacts in buying centers in target accounts. So the raw material that the ABM folks can pull from is getting better. From there, it's not customizing so much as configuring new content.

I suggest that marketers worry less about scale when it comes to content in ABM, and be more concerned about relevance – there's too much content being created for a need that doesn't exist. ABM folks need to connect with the people defining the content agenda to make sure that the content will ultimately be useful to help sales bring value to the accounts that the business cares about growing.

### How personalized does ABM content need to be?

We see a lot of content still targeted at the top of the funnel for overly generic personas. This happens when marketers say, "We sell into 20 industries and we've got 5 different personas in each and 5 sales stages and we can't develop content for all of them." So people throw up their hands and write something for CIOs in general and call it thought leadership.

What happens next is the overly generic content goes to Sales and can't be used because Sales says, 'I'm calling a CIO in this specific industry and he only cares about these two things'.

For named Account Based Marketing, Marketers really need to go back to the drawing board, inventorying their content in a much more account-oriented way based on sales priorities and identifying holes in coverage. This will help to get leverage from content because its development was prioritized based on customer and sales needs.

Of course, when you have very, very large strategic accounts with massive deals, that's often going to be a completely customized content effort.

## ABM Expert Q & A

### Megan Heuer, VP and Group Director, SiriusDecisions (cont'd)



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#### What are the obstacles to ABM?

ABM can be the victim of its own success. If you start with one or two people being asked to 'take on' ABM and it works really well, then Sales will want more. But marketing leaders can be reluctant to shift resources away from the things that they've always been doing.

When that happens, ABM marketers aren't able to scale their teams or their work as quickly as they'd like and they get a bit frustrated. It's a real issue.

#### Have you seen any ABM programs that don't instantly work?

Once in a while we see a team that doesn't get off on the right foot. Maybe they made assumptions about what Sales want, rather than going and really working with Sales. Then they walk in with a beautiful account profile and say 'Happy Birthday' and Sales says, 'What the heck is this?'

Also when marketers put Sales a bit on the defensive, going in and saying, 'We're here to help, give me all of your account plans and I'll come back to you with a marketing plan.' Sales isn't accustomed to handing over their account plans (and maybe haven't been so diligent about building them) and all of a sudden they're being asked to turn over the keys to the kingdom and that sort of puts Sales on the defensive.

A third one is if marketing goes in and says, 'Hi Sales, we want to do ABM what do you want?' and it sounds like they're asking Sales to tell them how to do their job. Then Sales just asks for the things that they've always known – some nice events, a bit of content. Or they say, 'No thanks, I'm good. I'm already working with this account. I really don't need you to do anything.'

The last failure point is starting with tactic selection. When marketers say, "I need to scale ABM, and I have marketing automation and email to use so we're going to do ABM with email nurture streams," and not look at the bigger picture, it doesn't work. ABM is not about email alone – or any one tactic for that matter.

Marketing needs to act in a consultative role that really showcases the profession, coming to the table to say, 'Hey, this is what we know our buyers prefer and here's what I recommend we do with this account to meet the goals that you told me you have.'

#### How big a culture change does ABM demand?

I often have marketers come to me when they're starting down the ABM road, nervous about having that first conversation with Sales.

And what I say to them is this: Sales is going to be really happy to hear you talking their language – talking about accounts, talking about support for relationships, talking about changing the way you engage with them to better fit their go to market model.

It's actually other marketers that you may have a hard time convincing. Because you're asking them to stop thinking about general concepts or segments and stop trying to do everything to reach everybody.

You're actually asking them to change the way they plan – to base plans on actual insights about actual accounts and the actual people in them. That's a dramatic change and it will be the hardest thing in ABM: actually changing the mind-set of marketers.

The other big culture change is around measurement. ABM is a partnership with sales, not a competition for who finds the most leads. This means the old view of marketing sourced pipeline as the only valuable outcome must change to a more nuanced view of the reality of a complex buyers journey and all the ways sales and marketing play a role in it.

# 4. Generate account-relevant messages and content

The insight you generated in Step 3 is only an asset if you use it – in every sales interaction and in all of the messages, offers and content you send into the buying team in each account.

The idea is simple:

**Every sales process is the sum of its engagements. Dial up the relevance and resonance of your interactions and content and you'll increase the quantity and quality of your engagements.**

“You need to create stories that the right people in your targeted companies would actually like to read and share.”

Johan Sundstrand  
Freya News

## What kind of content is right for ABM?

Every kind of content you'd use in a normal sales and marketing process will be effective in your ABM program – as long as it's targeted and relevant – including:

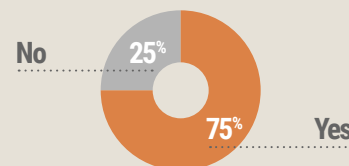
**Emails, eBooks, webinars, white papers, web pages, blog posts, slideshares, videos, infographics, podcasts, social media posts, interactive content, surveys, quizzes and graders...**

The key is to focus on tactics and formats that your audience engages with. Some personas read eBooks widely, while others don't. Some will happily watch half-hour videos; others won't even watch a 1-minute video.

## Relevance resonates

ITSMA research shows that 75% of executives will read unsolicited marketing materials that contain ideas that might be relevant to their business:

Would you read unsolicited marketing materials that contain ideas that might be relevant to your business such as success stories, research reports and webinar invitations? % of respondents (N=346)

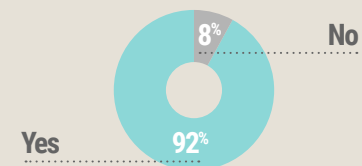


## Content marketing meets content selling

Content marketing has transformed B2B by letting marketers initiate conversations and develop relationships earlier in the buying process.

In the same way, content selling gives salespeople the ability to deliver the right content at the right time for each contact, adding real value to the conversation. In both cases, content harnesses your company's expertise to help your prospects do their jobs better – and reap the rewards of that.

Would you pay attention to these marketing materials even if they were from solution providers you had not previously done business with? % of respondents (N=258)



Source: ITSMA, How Customers Choose Study, North America, 2007

# Personalizing the executive conversation

At the highest level, ABM is about reaching the right senior executives. You don't maintain a conversation at this level with generic messages – or with slick content that signals 'generic marketing'.

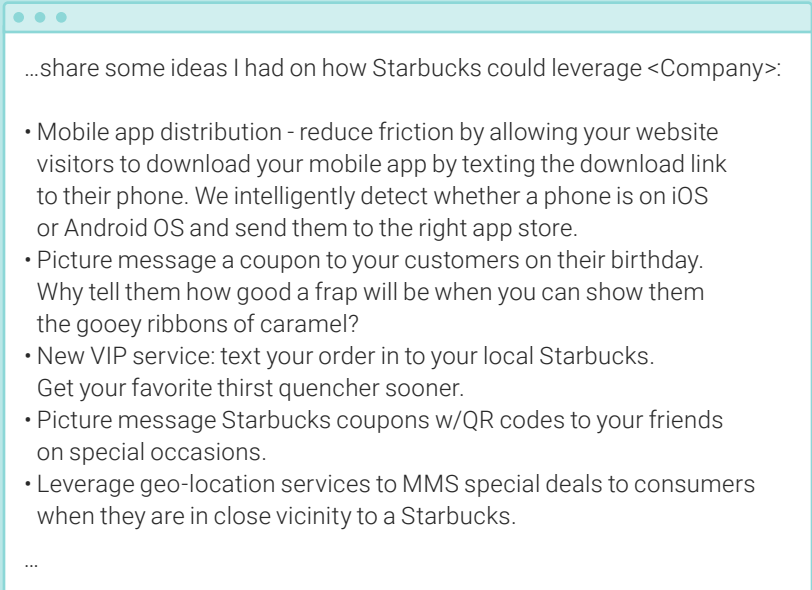
Instead, your programs will include personalized emails, reports and content that use everything you know about the company to prove you understand their most pressing challenges.

- Seeing a relevant article and popping it in the mail with a post-it note pointing out its relevance is a quick way to establish contact and credibility.
- For account-expansion, a great piece of content might be a case study showing how another division or group within the same company is using your solution.
- Mentioning your connection to the prospect is a strong opener for ABM conversations. "Bob Apollo mentioned you in a conversation about XYZ yesterday..."

This kind of executive-level interaction will often out-perform your more automated marketing (even when it is personalized).

## A personalized email:

This excerpt shows how a salesperson created a compelling, personalized story by taking the extra step of showing how their technology could specifically help the target company (in this case, Starbucks). Based on this email, the company was able to set up a meeting with the CEO, Howard Schultz. Even if the ideas aren't 100% right, they show you're thinking about their business in an intelligent way.

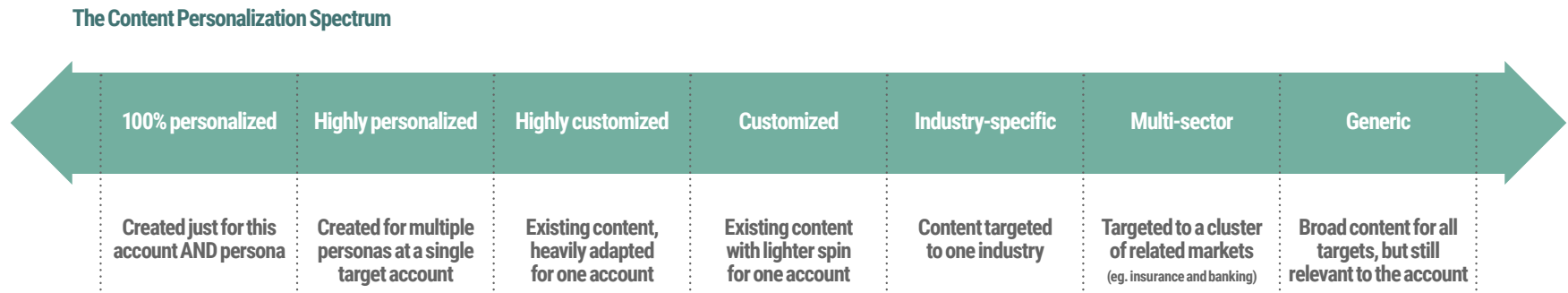




# Content personalization

Every piece of content does not have to be specifically created for each target account – that approach wouldn't scale.

Instead, think about a balanced mix of content, with each piece falling somewhere on the content personalization spectrum:



# Simple vs. super-personalization

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## Simple personalization

You can turn a relevant but broad piece of content into a super-relevant piece with some simple tweaks, including:

- Targeted title or subtitle
- Imagery that reflects the target industry
- Case studies from the target market
- Tweaked introduction and conclusion
- A targeted landing page and email

This allows you to scale up your content personalization efforts without breaking the bank.

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“Persona plus Industry is where the magic happens. That’s powerful targeting.”

Johan Sundstrand  
Freya News

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## Super-personalization

Content prepared ‘just for you’ can be the most compelling of all. Consider using your company’s unique expertise, resources or assets to produce a special report specifically on the target account and its key challenges.

For example, OpenDNS created a custom visualization of the network for each target account and used that in their campaign.

And a network security company would get meetings by scanning a client’s network, finding vulnerabilities, highlighting some of them and asking for a meeting to go over the rest.

Other vendors make highly personalized ‘Annual Reports’ for each major account (especially powerful for existing customers).

While these may be labor-intensive exercises, you might also find an automated approach. For years, Hubspot’s ‘Website Grader’ was a top-performing content asset that auto-generated a report from the target’s website URL.

However you create it, a custom report is often an irresistible offer:

**“I just ran this. Here are some of the recommendations. Can we set up a 15 minute call to discuss the rest of the report?”**



# Personalization in digital

## Personalizing digital media

There are more and more platforms that can help you personalize digital content at scale.

- Email tools and service providers can deliver highly personalized message flows that adapt as the audience interacts.
- Vidyard can insert a person and company name into videos.
- Marcom Central lets you personalize marketing assets like postcards and signage.
- Many digital print vendors can create cross-media campaigns that personalize across print, email and landing pages, at scale.
- PDF documents like eBooks can be personalized from a file of target profile data.
- Personalized landing pages are a great way to pay off personalized emails or direct mail.
- Content curation platforms make it easy to assemble an entire content hub targeted at a single account (see Content Hubs on the next page).

“If something reads like it could have been sent out to 100 other [people], then chances are that’s exactly what has happened.”

Adam New-Waterson  
LeanData



### Mini-Case: A print run of 12

The wholesale division of a European telephone network supported a pitch to a mobile operator with a highly-personalized printed book and eBook.

In it, the top executives of every department addressed their counter-part in the prospect company, by name, addressing the top concerns of each executive and committing to solve them.

Whether it was because of this innovative approach or the one-to-one mindset behind it, they got the deal.

“The same kind of predictive analytics you used in your account selection can guide your personalization for emails, advertising and content. It’s about the intimate understanding of a persona.”

Doug Bewsher  
LeadSpace

# Content relevance

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## Don't forget PowerPoint

The sales presentation is still a critical pivot point in most sales processes.

ABM teams can help arm each salesperson with the most informed, relevant and insightful pitches that speak directly to each audience and match everything the prospects have been seeing from the company.

Using a generic corporate deck to follow-through on a highly-personalized ABM process would be nothing short of malpractice.

## Content Hubs

Freya News, the ABM marketing agency, recommends industry-specific content hubs that contain content for all personas and buying stages. Uberflip, a content marketing company, creates content hubs for specific named accounts.

You then use targeted advertising, email and social media to drive your ABM contacts to the hub, where they find the right content for them.

"You can then link content into series or nurture flows to see how a prospect progresses with your stories," says Johan Sundstrand, Freya News CEO.

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"80% of clients have a huge content library. We look at what they have, then personalize it."

Jeff Sands  
ITSMA

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## A content playbook

An important part of any ABM account plan is a content playbook that maps messages and content to key personas and purchase stages.

A quick outline of key themes, stories and existing content summarized in one place can ensure that front-line sales teams have access to the right messaging to use in every interaction.

An internal content repository can make it easy for sales teams to discover and access the content or stories they need to support each interaction.

# Your ABM content creation process

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One of the primary uses for the insight you generate is to create content that will be super-relevant to the key people inside your target accounts.

## The ABM Content Creation Checklist

The ABM content creation process looks like this:

### Conduct a content audit

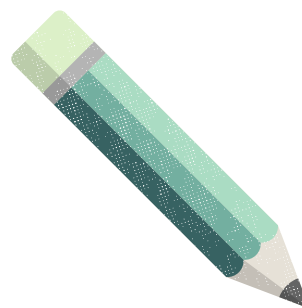
- Discover all the potentially relevant content you have right now.
- Tag it by account, persona, purchase stage and issue.
- Identify content gaps that need filling.

### Adapt existing content

- Pick content that's relevant and usable as it is.
- Identify content that needs simple revisions to make it account-relevant.

### Create new content

- Prioritize themes and issues for the account based on your insight.
- Identify sources: subject matter experts, existing content, etc.
- Create editorial calendar for content creation.
- Create content briefs and assign to internal team or agency.



## 5. Deliver account-specific interactions

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You've identified your target accounts and mapped contacts to them.

You've worked hard to generate insights about each one.

You've created relevant content and messaging that reflects that insight.

**Now it's time to get this targeted messaging in front of the people you most need to meet.**

This is where ABM gets active. Because, instead of promoting content widely and sitting back until people come and get it (the inbound way), you're going to actively get out there and make sure your target contacts see and consume the messages you've prepared for them.

And, instead of spending your budget trying to reach everyone in your market, you're going to laser-focus your budget on the named people in the key accounts that matter most.

"To grow your business, you have to reach out to people you don't know and don't know you. If they aren't downloading content, then you have to try something else. Welcome to reality."

Craig Rosenberg  
TOPO

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"It's not unusual to see 5, 7 or 9 touches to get a prospect to move to the next stage of conversion."

J.J. Kardwell  
EverString

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# Tactics to activate ABM

The tactics that ABM marketers use the most include:

- Live events (Owned and 3rd Party)
- Webinars
- Email
- Direct mail
- Social media
- Account development (SDR)
- Online advertising
- Search
- Web personalization

Yes, there are other tactics – and new ones emerging all the time – but these are the staples of any ABM program.

This is where ABM gets activated.

**Let's look at them in turn...**

# Tactics

## Events in ABM

Events are still the area of largest spend across B2B markets. They're valued because a high-quality, face-to-face interaction will always be the most powerful way to initiate a discussion, deepen a relationship or accelerate a deal.

For the same reasons, events are a core component of most ABM programs. But with ABM, the target audiences for all these interactions are the specific people from the buying teams in the target accounts you selected in Steps 1 and 2.

Events break down into two types: those your company runs; and those that other companies (or organizers) run.

### Tips from Maria Pergolino of Apttus

No one does ABM-style events better than Maria. Here are a few tips:

- Do an event for just one account – holding it in a venue close to their offices (or even in them!).
- Get a top executive from a target company to speak at an event – it's a great way to attract others from the company.
- When a buying center does their go-live, hold a bigger party at the client and invite other teams from across the company (laying the foundation for a future cross-sell).



### Who should do the inviting?

In traditional marketing events, sales wants marketing to do the inviting (because they want new prospects) and marketing wants sales to do the inviting (because they have the relationships and will invite people more likely to attend).

As with so many aspects of ABM, sales and marketing must work together to draw up the list of event invitees. The invitation itself then comes from whoever is best-placed to make that approach. When a relationship is already there, it will be sales. When not, marketing.

Tip: If you're targeting executives, the invitation should come from an executive in your company at the same or higher level of seniority.



# Tactics

## Events you run yourself

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### Events you run yourself

In ABM, the key metric for an event isn't how many people attend; it's how many of the right people from the right accounts attend.

With this in mind, a dinner, roundtable or roadshow-style event may be much more valuable than the industry's biggest exhibition. And inviting key leaders or entire teams to your in-house executive briefing center for a whole day can be even better.

The best ABM events tend to share these characteristics:

- **A timely, relevant topic** – on a specific pain point or trend.
- **A balanced content mix** – not just product talk – think panels, cases, chalk-talks... and fun content that's not commercial.
- **Third-party participation** – customers, experts, analysts, partners, etc.
- **A curated audience** – people who will learn from each other.
- **A softer sell** – not pushing sales decks to a captive audience.

Many of the best high-level executive events include unique, 'money can't buy' experiences. For example, Apttus held a high-end dinner hosted by celebrity Chef Michael Chiarello, and Marketo once held an event at Club 33, an exclusive members-only club inside Disneyland.

# Tactics

## Events other companies run

ABM programs aren't confined to your company-owned events. You can also make other events work for you, including those run by partners or by third-party organizers.

You may not be the only hero of these broader events, but you can still use them to develop relationships with your target contacts. A few tips:

### Set up meetings in advance near the event

This requires a lot of close work with sales – handholding the process, giving them a list of people you know will be at the event, sending phone and text reminders, etc.

### Invite your contacts to specific content within the event

To the speaking slot, demo room or on-stand activity. The entire event may not be yours, but this part is.

### Run a side event within or around the event

With the organizer's permission, hold your own roundtable, dinner or customer event.

### Create a VIP Track

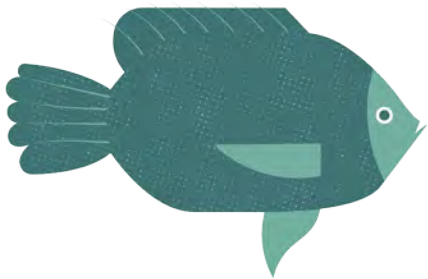
Making use of the entire event, but guiding and curating the experience.

### Earn the list of attendees

One way to do this is to hold a raffle offering to "Upgrade the Experience" (first class airfare, a luxury suite, limo to and from the airport, VIP pass to the party). Anyone who enters the raffle is a likely attendee at the event – so use the list to reach out to the right ones.

### Follow up

With an invitation to your own dinner, roadshow or sales meeting.



# Tactics

## Webinars in ABM

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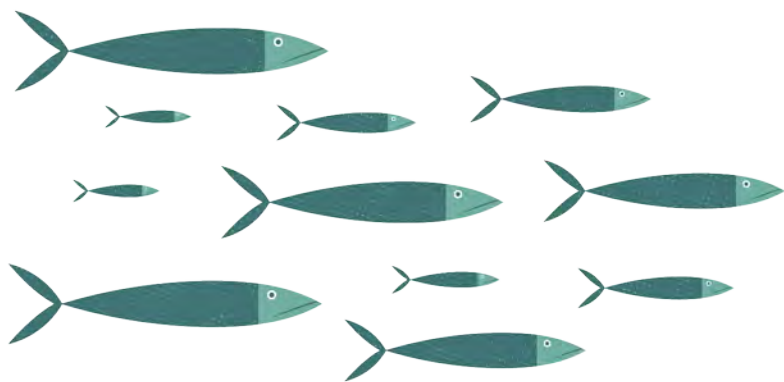
Webinars are very similar to your own live events – they just happen online.

The same principles that make for great live events apply to webinars, but you're able to invite many more people, from a much wider geography.

Just as with live events, you need your webinars to be timely, relevant, balanced and validated with third-party expertise.

Maria Pergolino recommends holding a webinar for a single account – if you're trying to penetrate GE, getting 20 of their far-flung executives on one webinar is a powerful tactic.

And unlike live events, you can archive the webinar and use it as content later.



# Tactics

## Direct mail in ABM

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Direct mail doesn't get the attention of the more recent digital tactics, but it still grabs a major share of budget for many companies.

And because of the focus on highly targeted lists of high-value prospects, direct mail has found a key role in ABM programs.

**The more focused your ABM and the better your account research, the higher value offer you can deploy.**

While even the high end of mass-market direct mail may cost around \$5 per unit, a successful ABM dimensional mailing might cost as much as a hundred to a thousand dollars – enough to make a real impact.

High-value and highly personalized dimensional mail can also break through a noisy marketing landscape for senior executives who may not download white papers or attend webinars.

One challenge: many databases don't include a postal address for contacts. You may have to do some digging to find the right one.

“Digital is high tech, low touch...  
direct mail is low tech, high touch.”

Sangram Vajre  
Terminus

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### Three examples of dimensional mail

- BT Global Services sent 100 Chief Security Officers an iPod Shuffle loaded with audio interviews and security-related tracks (Rescue Me, etc.).
- Another B2B company sent C-level executives an iPad pre-loaded with personalized video content and white papers.
- Ariba famously sent executives a remote control Porsche Boxster. To get the remote controller, they had to attend an event or take a meeting (a “give to get”).

## Tactics

### Direct mail in ABM (cont'd)

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Offers sent by mail are perceived as 24% more valuable than offers viewed only on a screen. And mail boosted ROI by 20% when used as part of an integrated campaign.

U.K. Royal Mail, February 2015

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“There’s a resurgence in direct mail for ABM. I get one or two mailings a day, compared with hundreds of emails. I notice a good piece of DM.”

Henry Schuck  
DiscoverOrg

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“The response rate for targeted direct mail is 4.4% – almost 40 times higher than email at 0.12%.”

Mail Print study, 2012

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#### Don’t ignore the team!

Go beyond the decision-maker. If you’re sending fancy direct mail to an executive, consider sending \$5 gift cards to other influencers on the account who might otherwise feel left out.



#### The personal note

Handwritten, personal notes can have just as big an impact as the high-value direct mail piece – as long as they’re timely, well-targeted and demonstrate insight about the recipient.

And services like Bond.com can generate and deliver handwritten (or apparently handwritten) notes from an online web form.

# Tactics

## Email in ABM

Email is the lifeblood of traditional demand generation and it plays a major role in ABM as well.

But in ABM, email is not a broadcast medium or the cog in an automated campaign or nurture flow.

Instead, it's a one-to-one human communications medium, with each email carrying a distinct, personal message to the prospect.

Used in this way, control of emails in an ABM context tends to pass from marketing to sales. Marketing may create email content but the SDR or sales rep will decide when and who it goes to – often with considerable personalization.

Instead of bombarding your targeted accounts, ABM teams often remove their contacts from the broader lead-gen and generic nurture mailing programs, so they can be treated in a more personalized way.

ABM emails also tend to be text-based and from specific individuals, rather than slick, HTML mails that signal 'marketing'.

**For these reasons, email will be covered in the Account Development section (on the next page), rather than as a pure marketing channel.**

### Tip: Make an offer they can't refuse

A \$50 gift certificate for attending a one-hour online product demonstration can be very effective – but you'll want to target such expensive offers at the right people in the right accounts.



The screenshot shows an email from Marketo. At the top left is the Marketo logo. Below it, the text reads "Marketing Activities" and "Demo Marketo and receive a \$50 Visa Giftcard". To the left of this text is a blue Visa giftcard with "\$50" and "VISA" visible. To the right is an orange button that says "REQUEST FREE DEMO". Below this is a section titled "Live Demo – Easy, Powerful, Complete Marketing Software" with the subtext "Featuring New Packaging and Pricing!". Underneath is a paragraph of text: "Under increased pressure to make more of limited marketing resources? Discover an easier way to tackle these challenges and more by getting a [live demo of Marketo](#). There's never been a better time to take a look - Marketo has a variety of new solution editions with pricing that fits any budget - plus we'll give you \$50 just for taking a look!". Below this text is another orange button that says "REQUEST FREE DEMO". At the bottom of the email, there is a link: "Experience a live demo of Marketo and learn how to:" followed by a bulleted list of features.

- **Extend the reach of your marketing campaigns** via social features such as sharing, polls, and referral programs in all editions
- **Automate time-consuming tasks** such as email and landing page creation, segmentation, lead scoring and management

# Tactics

## Account development in ABM

Sales Development – or Prospecting – is the heart of every ABM program.

It combines email, phone calls and the personalized end of social media interactions into a coordinated series of engagements that develop and deepen relationships.

In many companies, outbound prospecting and Sales Development Reps were the sales department's response to the inability of traditional demand generation tactics to make inroads into major accounts.

**But now, ABM brings marketing and outbound sales development into alignment, focusing efforts across the teams in a coordinated way.**

In this context, Account Development in ABM is a long game. Instead of pushing for a close right away, the idea is to become a credible, trusted partner that they want to talk to.

**In TOPO's 2014 Sales Development Benchmark report, 56% of sales development organizations had teams dedicated exclusively to outbound prospecting.**

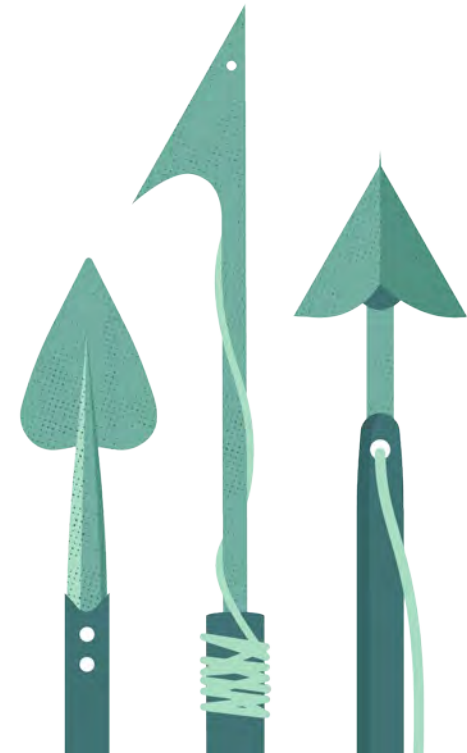
### Get the meeting

In ABM, the goal of account development is often to get the meeting for the sales rep, not to sell the product.

With this mindset, SDR programs shouldn't try to 'close the deal'. Instead, they should be all about seizing opportunities to set up a meeting.

.....  
"Don't call me and read a script. Make it personal and change the nature of the relationship from buyer-to-seller to businessperson-to-businessperson."  
.....

Craig Rosenberg  
TOPO  
.....



## Tactics

# Account development in ABM (cont'd)



### Nurture the relationship

Once a dialogue has been established, the SDR needs to nurture the relationship with a series of relevant, informed touches – not just regular ‘check-ins’ to see if the prospect is ready to meet.

This is the time to use all the account insight you’ve generated to prove to the prospect that you understand their challenges and have a unique approach to solving them. For instance:

**Invite them to an event** – reach out and make a personal invitation to one of your own events or your part of a broader event.

**Send them content** – it doesn’t have to be your own content – an article or blog post with an “I read this and thought of what we discussed” goes a long way.

**Help them solve a problem** – introduce them to someone, suggest a tactic or send a case study that addresses an issue you know they have.

**Comment on their activity** – let them know you saw their blog post, watched their webinar or read that article.

This kind of thoughtful engagement is much, much better than the rote, zero-content ‘check-in’.

### Prospecting Tips

- **Work your referrals** – still the most effective prospecting tactic.
- **Get the prospect’s direct number** – and skip the switchboard or PA.
- **Call before 9 and after 5** – or figure out your prospect’s typical work schedule... and catch them before or after they get busy.
- **Don’t block your number** – no one answers from blocked numbers.
- **Track their response to your emails** – use outbound-focused email technology to see if they open your email or click a link.
- **Share their social posts** – help them spread their messages (without overdoing it!).
- **Look at autodialers** – it can be an efficient way to optimize call resources, connecting more prospects to live calls – and predicting the best times to call. Many of them include local-number dialing which can increase pick-up rates.

InsideSales.com says: “Wednesdays and Thursdays are by far the best days for making contact with leads. Mondays and Tuesdays are the worst. Fridays are not too bad. While we don’t know why this is, time after time the data shows us that it’s true.”

### Account Based Sales Development

“Targeting outreach campaigns by account enables Cloudera SDRs to research individual accounts and buyers and speak to their exact pain points. As a result, these campaigns produce a 60% open rate, 31% response rate, and massive increases in both net-new opportunities and add-on business from current customers.”

TOPO: Cloudera Case Report, September, 2015



# Tactics

## Online advertising in ABM

With ABM, you need a way to reach out to important buyers where they are, instead of waiting for them to come to you.

That's why an intelligent use of online advertising and retargeting – across mobile, social, display and video – is the answer for many ABM teams.

### Laser targeting your ads

Advertising in ABM is very different from the broad ad campaigns that blanket websites where some of your prospects may or may not spend time.

Instead, ABM advertising waits for the contacts in your chosen accounts to visit a page, and then serves an ad that's relevant to their situation and their stage in the buying cycle.

This includes techniques such as:

### IP-lookup

Serving ads to any browser using the known IP addresses of your target companies.

This technique is more targeted than broad advertising but includes many people within the target company who have nothing to do with the buying team. Because the audiences are still somewhat large, it typically requires fairly large commitments in terms of media spend.

### CRM Retargeting

Using an onboarding vendor, you upload the email or postal addresses of the people you'd like to reach. They match these addresses to known browsers so you can serve relevant ads to them. Again, a powerful tactic. But your onboarding partner will only have a match for some of your target prospects (often below 50% in B2B).

### Proactive Retargeting Using Third Party Data

Data providers such as NetProspex and vendors like Terminus and EverString now provide the ability to advertise to specific personas and roles on your ABM target list.

These highly targeted services can significantly reduce the waste in your advertising budgets, focusing on the people you need to reach. You'll spend more on the technology, but less on media. Note that B2B match rates for this approach also tend to be below 50%.

“You can take an email and cut and paste it into a LinkedIn message and the LinkedIn message will outperform the email with 7x response. Even further, if you send the message by InMail, you'll get a 33x increase in response.”

InsideSales/Hubspot eBook, 'Master Tactics for Exponential Growth'

### Does Facebook work for B2B?

Many B2B marketers question whether Facebook is effective for their audiences. To us, if your targets are on Facebook, it can be an effective channel. The key is to make the offers 'Facebooky' – leading with content instead of sales messages, etc. – so the experience isn't jarring.

# Tactics

## Online advertising in ABM (cont'd)

### Mini-Case: They liked it so much they bought the company

2lemetry sold business intelligence software for the Internet of Things. They wanted to get a partnership with Amazon Web Services.

They wrote a custom blog post about how their solution would work with AWS' Lambda platform, then bought a Facebook ad, targeting everyone who worked at AWS.

Within 2 weeks, they had a meeting with the right people.

A few months later, AWS bought the company!

### Social Media Advertising

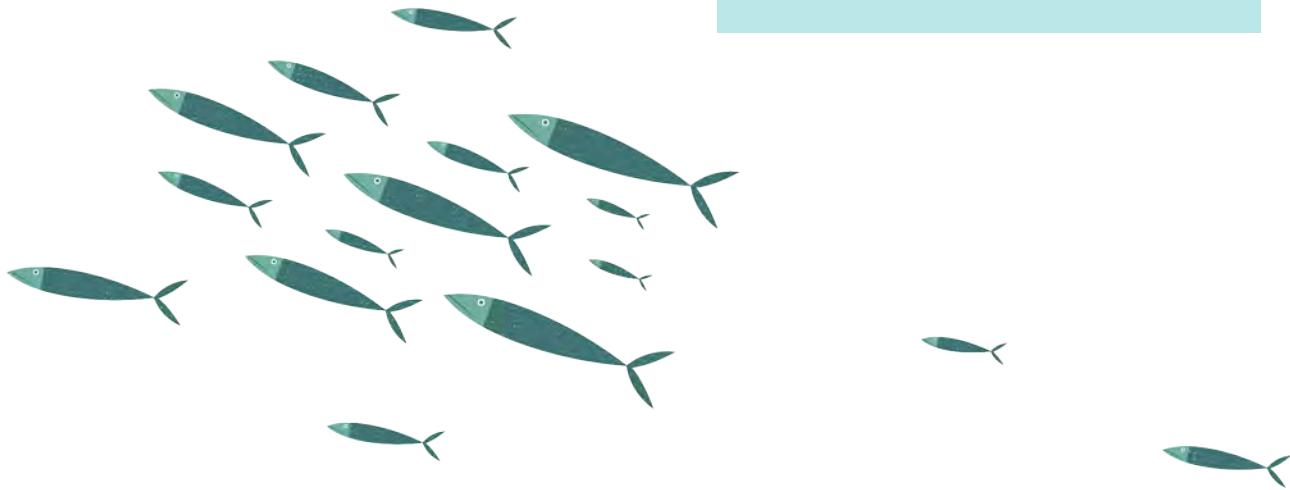
Social media platforms also let you target your advertising (sponsored posts) to specific individuals, companies and personas (e.g. Custom Audiences on Facebook and Tailored Audiences on Twitter). LinkedIn goes even further with products such as Sponsored Updates, Sponsored InMail, and Lead Accelerator. Social platforms enable super-targeted advertising opportunities including letting you load a list of targets directly – just make sure that the creative you use is appropriate for the specific platform.

All these methods help you focus your ad budgets where they'll make the most impact: exposing more of your ads to the people you need to influence and fewer of the others.

### Personalized Search

With Google's new Customer Match feature, you can now upload a batch of email addresses to Google and it uses them for targeting specific customers at specific accounts. This works on Search as well as YouTube TrueView, Gmail, and the Google Display Network.

Since match rates for B2B emails may not be high, use this to bid higher for known matches, not to exclude all other searches.



## Tactics

# Online advertising in ABM (cont'd)



### Be where your contacts are

If you confine your advertising to sites that are in your industry, you may be missing a lot of opportunities to reach key contacts.

Instead, your advertising partners can help you generate impressions wherever your target personas are, engaging with them on mobile, social, video and premium sites that might not be directly related to your market.

The result: more impressions to more contacts, when it matters most.

“When targeting senior executives, expect zero leads. Just get your value proposition in front of your target accounts. That’s the goal.”

Sangram Vajre  
Terminus



### ABM ad creative

ABM advertising isn’t about the click. It is an awareness builder and can provide brand recognition and ‘air cover’ for your outbound efforts. It can also support open sales opportunities, help nurture existing relationships, and support activities surrounding targeted events.

The key is to be seen by the right people at the right time, sending the right message.

“It’s not always ‘download this’”, says Sangram Vajre of Terminus, “And you don’t want to take people to gated content. We find that case study pages with some kind of demo call-to-action work really well in ABM.”

#### Tip: Frequency capping

You don’t want to waste your budget and annoy your prospects by swamping them with your ads. Instead, set a frequency cap.

One exposure per hour and 3-6 per day for 30 days is a high rate but not overwhelming. Way above that and you may be going too far.

# Tactics

## Web personalization in ABM

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More than 98% of visitors to your website are anonymous when they arrive and still unknown when they click away.

That hurts.

But it doesn't mean you can't use your website in your ABM program – you can, by personalizing the web experience to your chosen accounts.

Using tools such as Marketo Real-Time Personalization, Optimizely, Triblio, and Evergage, you can identify the company and industry that a visitor belongs to, then serve them up images, case studies and offers that target that account or industry. If you're targeting healthcare, retail and financial services, you can create three different home pages and website paths that are optimized for each.

And if you've created account-specific content, you'll want to feature that when a member of that account hits your site.

Once a visitor is known and in your marketing automation system, you can personalize even more – by persona and buying stage, for example.

In short, **your web experience can be as personalized as your email**, even before you know exactly who's visiting. That's a powerful tactic and an important one for your ABM program.

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“On sites, we've seen personalized exit pop-ups and sliders that have achieved four times the conversion rate over static forms. The pop-up offers an industry- or account-relevant white paper that relates to the topic of the page and varies by customer.”

Jason Jue  
Triblio

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# Tactics

## Future ABM tactics

In B2B marketing, new channels and tactics open up nearly every month.

As they emerge, you only need to ask yourself, 'Will my prospects be here?' and, if so, 'How can I target them?'

As more and more digital channels become addressable, we'll see ABM tactics emerge to harness them.

Smart devices, addressable TV, iBeacons and near-field technologies, self-driving cars, smart watches and wearables – they'll all create opportunities to target your most important contacts.

It's not about chasing the next shiny object – it's about making sure your prospects are there and that you've got something relevant to share with them in this new context.



### Avoiding the Creepy Factor

As ABM develops, it's important to maintain the integrity and ethics of the discipline.

Used insensitively, personalization can cross that 'creepy line' into cyber-stalking. And if you start playing the volume game with ABM, the relevance of your interactions plummets – and you turn into a spammer.

ABM marketers are among the smartest in the business. Let's keep the standards high and treat prospects the way we'd like to be treated ourselves.

## 6. Orchestrate account-focused plays

The tactics discussed above are all effective in isolation – but they’re far more powerful when combined into orchestrated ABM plays that synchronize many different interactions and channels as part of an integrated account plan.

Orchestrated ABM flips the traditional marketing process on its head. Rather than broadcasting to a wide audience and filtering leads as they come in, you do significant filtering in advance and then design account plans that deploy a highly orchestrated, multi-channel, multi-tactic effort to initiate conversation and deepen the relationship.

“The companies that have had success have really positioned ABM as a strategic business initiative rather than a marketing program. Salespeople, finance, IT as well as marketing people need to agree that this is an important investment to make for the outcome to be most beneficial.”

### **Bev Burgess**

Senior VP and ABM Practice Co-Lead,  
ITSMA Europe

“Outbound sales development is not a complete answer. It works a bit but you really need an orchestrated, multi-channel effort.”

### **Craig Rosenberg**

TOPO



### **Multi-channel improves prospecting**

Prospecting can lead to a significant increase in conversion rates when combined with ad retargeting, according to a study by programmatic marketing company, DataXu.

DataXu ran several tests across four industries and found that combining the two techniques – outbound prospecting and retargeting – drove up conversions by:

- 37% in the automotive industry
- 43% in telecom
- 128% in customer service
- 147% in financial services

# Channel diversification

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With ABM, you don't want to put your entire budget in one basket.

Different buyers will resonate with different channels, so using more channels means you have more ways to reach the target. It's like a stock portfolio: diversification spreads your risk and increases your chance of a hit.

A C-level executive at a target account might not be returning your phone calls because she doesn't like phone calls. A multi-pronged attack lets you discover which channels each contact prefers, so you can use it more in future.

"I like to start by adding a C-level contact on LinkedIn. Then emailing. Then calling. And then following up that call with another email. This builds name recognition for you and your brand.

"And it also offers opportunities for executives to follow up in the way they feel most comfortable with. If when calling you reach a gatekeeper, just ask what the best way to reach the executive is. They'll usually just tell you."

Jesse Davis  
RingDNA

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# Cadence

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The intensity and reach of your ABM campaign will depend on the size of the opportunity and the limits of your resources.

But ABM is never a 'one and done' effort; it's a continuous program that never stops communicating with key accounts – even after the deal is done.

“Keep in mind: it’s a marathon not a sprint. Take a deep breath and plan a drip campaign that unfolds over the course of an entire quarter.

“Plan to drop a dozen pieces of content evenly paced throughout the quarter. Employ a mix of 4:1 online:offline content. So for every four pieces of digital content you provide, send one “old school” item. It could be a handwritten letter, a reprint of an analyst report, or even a magazine or newspaper clipping with a post-it attached.”

**Craig Rosenberg**  
TOPO

“It takes an average of 9.82 touches to engage with a prospect. We also find that senior executives are 2.5 times more responsive to quality multi-touch campaigns than are junior executives.”

**Dan McDade**  
President & CEO, PointClear

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When it goes well, all the moving parts in an ABM campaign work together to synchronize your messages across the entire account, touching each persona regularly with consistent messages.



# ABM orchestration example plays

Your own ABM playbook will be highly customized to your challenges. But these quick examples of integrated plays will give you a sense of orchestration in action:

## “Open The Door”

An intense, three-week blitz to open the door (e.g. get a meeting or at least build a relationship) with a cold account.

**Set-up:** All messages align around a common theme, business pain or content offer.

**Wave 1:** Targeted ads across social media and web to “soften the beach”.

**Wave 2:** Outbound

**To Execs:** Dimensional mail drop, followed by multi-step outreach from the sales executive over personalized email, phone, and social.

**To Managers/Directors:** Lower-cost direct mail, followed by SDR outreach over email and phone.

## “Deal Accelerator”

Surround all influencers and decision-makers at an account with supportive messages to help increase the velocity and win rate of current open opportunities.

**Set-up:** Content and creative around the key theme of each deal.

**Wave 1:** Ad retargeting by persona and web personalization by account.

**Wave 2:** Email offering new content to all known contacts.

**Wave 3:** Content sharing of second piece via social channels.

## “Human Account Nurturing”

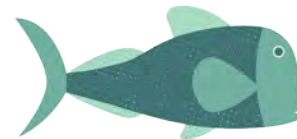
Don’t leave nurturing of the most important people at the most important accounts up to an automated machine – build a real relationship over time with human-to-human interactions.

**Set-up:** Map relevant content to personas.

**Ongoing:** Personalized, one-to-one emails using ‘next best content’.

**Ongoing:** Ad retargeting and social media advertising by account.

**Optional:** The occasional direct mail piece can pay off big here. Bloomreach sends a recent business book once a month to their most important contacts.



# ABM orchestration example plays (cont'd)



## “Meetings Generator”

Before a 3rd party event, identify key people at key accounts you want to meet with, then reach out in a personalized way to set up meetings.

**Set-up:** Develop list of potential attendees; develop event theme.

**Wave 1:** Personalized, one-to-one notes to key executives, from key executives; share content on the theme.

**Wave 2:** SDR reminders before meetings.

## “Account Qualifier”

When overall engagement goes above a pre-defined threshold, reach out to the account to qualify sales readiness.

**Set-up:** Track engagement at the account level and identify which accounts spike on engagement.

**Wave 1:** Reach out to select contacts to gather insights.

**Wave 2:** Contact right contacts – go wide – with messages based on insight.

## Selling from the influencer up (and out)

The leads that fill out an online form or come to your tradeshow booth are often influencers, recommenders and researchers, not true decision-makers.

Instead of treating them as hot leads to jump on, use these as signals of account-level interest and engagement. Research the account to find out the right person to contact, then make that approach. And use the influencer as a critical source of insight and an ally.

“If you successfully sell the value of your product to the influencer, that person will be more likely to provide any information you need to make the critical sell to the decision-maker.”

Source: Mark Roberge, Chief Revenue Officer, Hubspot

Here are Mark’s tips for leveraging the inbound lead to get the insight you need to go higher:

- **Ask these questions:** What has [decision-maker’s name] been talking about in team meetings lately? What has [decision-maker’s name] been on your case about? What was discussed in the last company meeting?

- **The key to the first call is needs assessment.** The salesperson needs to understand the challenges (realized or unrealized) the organization faces today and use that information to sell. With the data collected in the first call, sales can craft relevant messaging directly to the decision-maker or other stakeholders.
- **An example:** During the first call with the champion, spend less time on the product and more asking questions that allow you to create a customized benchmark report with real prospect data. Then turn that benchmark report into a reason to have a meeting with the decision-makers. It works. (Executives love benchmark data).
- **Recommend to the champion that the next call be with a wider group including decision-makers.** If they can’t get the meeting, you should go high yourself... call high and wide with your discovery data. If you’ve done a thorough needs assessment, you should have discovered the organization’s pains and challenges. So call high and wide anyway. The key is to translate what you heard on the first call into a reason the decision-maker should care about you.

# ABM orchestration example plays (cont'd)



## “Land and expand”

Using ABM to grow share of wallet in existing customers by cross- and up-selling.

**Set-up:** Identify the buying centers with the best cross-sell and up-sell opportunities, including measuring success of the current customer groups.

**Set-up:** Document how the solution is being used internally and map the key selling messages for each buying center.

**Wave 1:** Start with personalized account rep emails, leveraging existing relationships.

**Wave 2:** A drip email campaign offering persona-specific content.

**Wave 3:** Invitations to local events (dinners, roadshows, etc.).

“If an FMCG [fast-moving consumer goods] company has a story about increasing in-store revenue at Walmart, that’s the story everywhere: in email, phone calls, voicemails, conversations, ad views... it’s all orchestrated and it’s extraordinarily effective.”

Craig Rosenberg  
TOPO

“Of all the channels for getting content to prospects, salespeople are still the best.”

Johan Sundstrand  
Freya News

## Spam is in the eye of the beholder

ABM is all about personal communication that delivers relevant content. That’s the opposite of spam.

But in any outbound program, you’re going to have to reach out to people who haven’t yet reached out to you. Generally, it’s considered okay for an SDR to send a 1-to-1 email from a personal account. But even this can be seen as spammy if it’s essentially a broadcast message in the guise of a personal approach.

Since spam is in the eye of the beholder, the rule of thumb must be to keep your messages as personally targeted and relevant as possible and to only mail the people who should really be receiving – and want to receive – any given message.

One goal in ABM, then, is to get opt-in for future emails. SDRs can use other channels to do this – from calling, to events to mail – simply asking permission to send relevant emails on issues that matter to the prospect.

Keep the emails specific and targeted to the individual. And refrain from the mass techniques that (rightly) trip the spam alarms.

# Account plan

The account plan drives each account's ABM program, from goals to next steps.

In traditional selling, account plans normally focus on the products or solutions that the company wants to sell. ABM turns this around and starts with an account-centric view that focuses on relationships, reputation and revenues.

Here's how to make your account plans:

## Step 1: Map the buying centers at the account

A buying center is a subset of people at the account that can collectively purchase one or more of your solutions.

For each potential deal, you'll need to map out the relevant buying center and define the relationships between the people in it. Identify the decision-makers, influencers, mobilizers and potential blockers. Your account plan will be built around these people.

## Step 2: Research each buying center

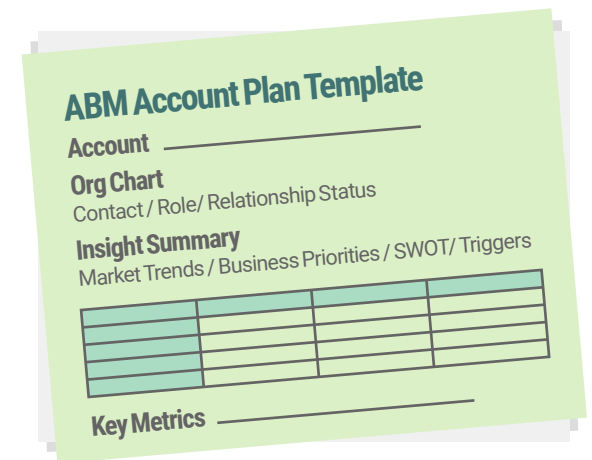
Identify the key issues and challenges for each member of the buying center (see the Insights section for all the things to research and sources of information).

Specifically, look for white-space opportunities – which buying centers have opportunities for which of your solutions.

## Step 3: Define goals for each buying center

Your account goals will depend on where the buying center is right now. Do you need to get in the door? Accelerate the deal? Drive success at an existing customer? Cross-sell?

Your goals will guide the buying journey that you want each buying center to take – the **Buying Journey Stages** the account will go through on the way towards achieving the goal.



## Step 4: Assign plays to journey stages

Based on the goal and buying stage, map interaction plays to each buying center that will help move them closer to goal.

A play is essentially the motions that you hope the buying center will take and the things you'll do to get that to happen. It will include messages, tactics and customized content for each stage, based on the account insight.

# Scaling your efforts

The table from page 30 bears repeating here, as a guide to mapping your cadence to your opportunities.

ABM Tiers help you target efforts appropriately.

Tier	Number of accounts	Tactics
1	20-50 [Tens]	<ul style="list-style-type: none"><li>• <b>Account Plans</b></li><li>• Deep research and 1:1 personalization</li><li>• Sales + SDR + marketing + executive support</li><li>• Targeting lasts for months / years</li></ul>
2	~200 [Hundreds]	<ul style="list-style-type: none"><li>• <b>Segment Plans</b></li><li>• Industry / solution / persona level personalization</li><li>• SDR (phone + email + social) + Marketing (ads + direct mail + events)</li><li>• Multi-touch over weeks</li></ul>
3	1000s [Thousands]	<ul style="list-style-type: none"><li>• <b>Solution Plans</b></li><li>• Limited personalization</li><li>• Inbound (marketing qualified accounts)</li><li>• Targeted outbound in waves</li></ul>

# ABM Expert Q & A

## Donal Daly CEO, the TAS GROUP



### What is an account plan?

When I think about account planning, I like to think of my account as a marketplace that I want to lead. Thinking of it this way gives me cause to pause – and think about where in the market I should focus, and which segments I should avoid. The plan is about building long-term business relationships in a complex marketplace that enable you to create, develop, pursue, and win business that delivers mutual value for you and your customer.

### Why is an account plan so important?

Account planning helps you maximize the return you get from an existing key account, a new strategic account, or a group of named accounts in your territory.

I'm sure you know that acquired business from an existing customer is six times more profitable than pursuing new customers. But, did you also know that you're seven times more likely to win business from an existing customer than you are when trying to capture that new logo?

### What are the key elements of a good account plan?

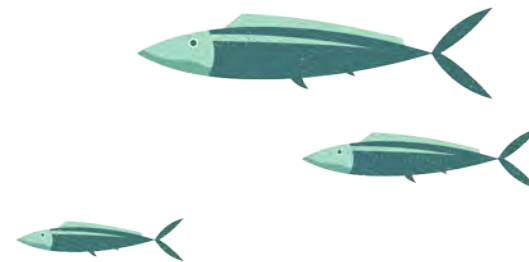
To be successful at account planning, you always need to be thinking about how to maximize revenue from your existing accounts by bringing value to your customer.

In my book [Account Planning in Salesforce](#), I set out three basic themes or phases for an account plan:

**Research for Insight** into Customer, Competitor and Company.

**Integrate for Velocity** by using four primary sources: existing CRM data, account team knowledge, information shared by the customer and supplementary data from research resources like Data.com.

**Focus for Impact**, prioritizing your plan units to maximize mutual value and target the opportunities where you can uniquely and competitively deliver.



## ABM Expert Q & A

**Donal Daly**

**CEO, the TAS GROUP (cont'd)**



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### **How do account plans get created and updated?**

Here are 10 best practices you should think about as you look to how your existing customers can contribute to your revenue goals for the coming year (with a focus on Salesforce users).

**Research** – ABM is really all about research, research, and research. Slow down your natural inclination to pursue the deal now. Account planning is a long-term play.

**Customer Focus** – Your role is to create value for the customer, not just to communicate information about your company or your solutions.

**Integrate** – Integrate data, knowledge and information to achieve velocity.

**Target** – Select which business units in an account are in your ‘sweet spot,’ where you can uniquely and competitively deliver true value.

**Map People and Influence** – Business issues are always owned by people. It’s important to understand the political landscape in the organization.

**Align to Business Strategy** – Align your account planning efforts with the customer’s Goals, Pressures, Initiatives and Obstacles.

**Build Trust** – Trust is the foundation on which you create, develop, pursue, and win business that delivers mutual value for you and your customer. Promise what you can deliver, and deliver on what you promise.

**Analyze White Space** – Once you understand the people and their business problems you can identify areas of opportunity – the white space in the account – where your solutions can add value to the customer.

**Maintain Cadence** – Account Planning should not be an annual event. It is not about reporting what you know; it is about discovering what you don’t know, and then acting to uncover the missing information to inform your subsequent activity, and should be integrated into your overall business cadence.

**Measure** – How do you know if your account plan is working? You need to be able to measure that the plan is complete, and we recommend automating this measure. You also need to create a scorecard to assess whether the objectives you set for the plan – the target revenue, the pipeline goal, the penetration of the strategically important business units in the account, etc. – are all on track.

## Part III

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# Metrics: measuring account progress



# Part III

## Metrics: measuring account progress

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Metrics are such a big topic – and so critical to ABM success – that instead of squeezing Step 7 into Part II, we’ve written a whole section on them.

**Marketing has made significant progress in using metrics to earn accountability and respect. But the rise of Account Based Marketing demands new ways of thinking about marketing metrics.**

While leads and opportunities are important and even necessary metrics, they are not sufficient to measure Account Based Marketing.

**Traditional demand-gen metrics simply aren’t enough for ABM.**

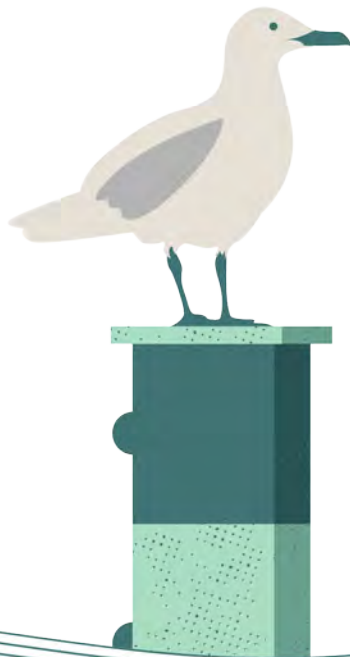
You need metrics that are suited to this specialized discipline – or you’ll be pursuing and rewarding the wrong things.

The five categories of ABM metrics are:

- Coverage
- Awareness
- Engagement
- Program Impact
- Influence

These new ABM metrics are extra dimensions to the traditional metrics like leads, pipeline, and revenue.

**Now let’s drill down...**



# ABM metrics are different

Account Based Marketing is a fundamentally different approach that requires fundamentally different metrics. Here's why:

## Account Based Marketing calls for account-based metrics

By definition, Account Based Marketing focuses on key accounts, so it follows that the metrics must do the same. You need to **measure ABM with an account-centric lens**.

## ABM is about quality, not quantity

In ABM, marketing won't be generating many "hot leads" – so even metrics that incorporate quality (like "marketing qualified leads") become less useful. In short, marketing needs to create **influence with the people who matter**. That's a new and different mindset about how marketing is measured.

**Which would the sales rep value more – 20 random low-level professionals downloading your whitepaper, or one meaningful conversation with a decision-maker at one of her target accounts?**

## The low volumes of ABM change the metrics you know

The volumes in ABM are too low for traditional funnel metrics such as conversion rates. A sales rep with 20 accounts can't accept a 5% conversion rate – she needs to be thinking about growing revenue from every single account.

## Marketing can't wait for closed revenue to measure success

Ideally we would always be able to measure ABM using closed deals and revenue. And marketing certainly should measure those things. But in reality, we can't afford to wait that long before we measure success – especially when there's a long gap between top-of-the-funnel lead generation and bottom-of-the-funnel pipeline creation.

Marketers need a way to measure progress in the middle-of-the funnel, as an account develops. The longer the sales cycle, the more you need metrics to understand what's going on as it progresses. This is especially challenging in ABM, since the larger the deal, the longer the sales cycle.

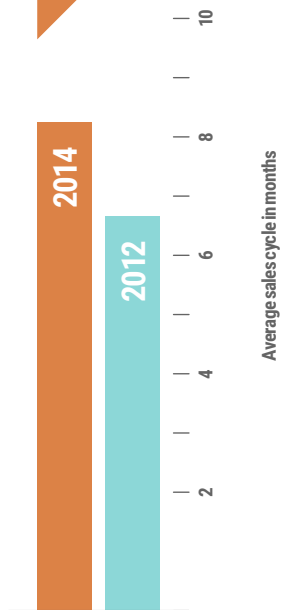
That's where engagement comes in. By tracking how deeply the right people at an account engage with your brand, marketers have a **quantifiable way of showing development** through a potentially long nurturing process.

"You can't wait a year to see results [in ABM]."

Megan Heuer  
SiriusDecisions

# ABM metrics are different (cont'd)

Companies have reported a 24 percent increase in the length of the sales cycle.



Source: 2014 SiriusDecisions

## In ABM, marketing supports and influences pipeline creation

The larger and more complex the deal, the less we can measure marketing in terms of 'marketing sourced' leads and pipeline. According to SiriusDecisions, marketing sources 25-45% of pipeline for companies selling to non-named accounts, but sources less than 10% of pipeline at strategic or enterprise accounts. And many ABM plays are about accelerating existing pipeline, not creating new revenue.

So instead of relying on marketing generated pipeline as a way to prove value, account-based marketers need to show their impact on revenue by demonstrating how well they influence deals and improve key business outcomes such as win rates, deal velocity, and average contract value (ACV).

“If you believe ABM success is measured only on lead volume... think again. ABM is about influence.”

Megan Heuer  
SiriusDecisions

## ABM is about customer expansion, not just new logos

Deepening relationships with existing customers is a big part of ABM, but the traditional marketing funnel metrics focus almost exclusively on new business.

In ABM, we need metrics for both sides of the “bow-tie”. **Cross-sell and upsell pipeline and revenue** are certainly part of this equation, but ABM metrics should also include advocacy, referrals, customer satisfaction, and net promoter scores.

Clearly, for all these reasons, ABM needs its own approach to metrics – an approach that measures the right things in the context of large, complex deals.

# The new metrics for Account Based Marketing

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So if account based marketers can't claim victory on the wrong metrics (e.g. leads) and they can't claim it exclusively on long-term metrics (e.g. revenue), what can they do?

We suggest five additional categories of Account Based Marketing metrics:

- 1 Coverage**  
Do you have sufficient data, contacts, and account plans for each target account?
- 2 Awareness**  
Are the target accounts aware of your company and its solutions?
- 3 Engagement**  
Are the right people at the account spending time with your company, and is that engagement going up over time?
- 4 Reach**  
Are marketing programs reaching the target accounts? How much waste is there?
- 5 Influence**  
How are the ABM activities improving sales outcomes such as deal velocity, win rates, average contract values, retention, and net promoter scores?

These new ABM metrics don't replace traditional metrics like leads, pipeline, and revenue – those are still important, and you should track them for both new and existing customers.

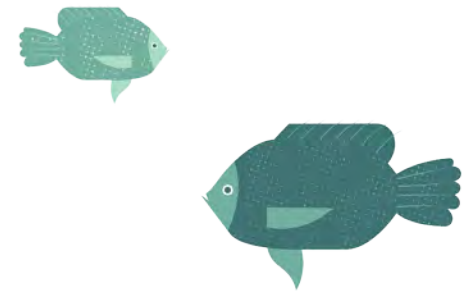
But, as we've seen, the traditional metrics are not sufficient for Account Based Marketing, and so marketers need to get adept at additional metrics to show success.

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“Don't count the people that you reach; reach the people that count.”

David Ogilvy

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# Metrics

## 1. Coverage

### How effectively is your team building contacts with the people who matter at your target accounts? How complete is your account data?

Coverage is the most basic of the ABM metrics. It's a measure of data quality and completeness, telling you whether or not your database has the right people in it.

Think about the organizational chart for your accounts:

- How complete is your information?
- How many boxes are filled in?
- Where do you have gaps in your data (e.g. you know email address but not a direct-dial phone)?
- For those with contact data, which ones do you have permission to email?
- Which ones are engaged?

A complex account may have dozens of divisions, each with its own separate org chart. Do you know what each of the divisions are, and how they relate to each other? Do you know the buying centers and key contacts in each division?

### Your People Map

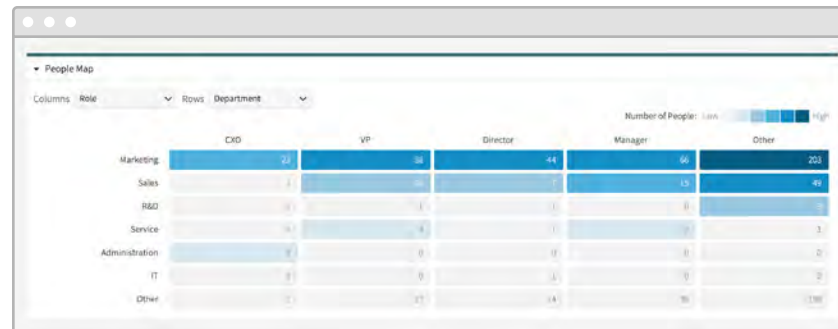
A nice way to visualize coverage is to use a two-dimensional People Map. Put Level on one axis and Department on the other, and then plot out how many contacts you have for each cell. Do this for a single account, or a list of target accounts – it's a great way to see where you have gaps so you can focus your list building efforts.

Imagine being able to share that your team built opt-in permission with 42% of the key names at your target accounts, when the company had only 8% coverage to begin with. That's powerful.

Use a People Map to identify whitespace in your coverage for an account.

### Account Plan Coverage

Coverage can extend to your ABM strategic planning as well. How many of your target accounts have complete account plans? How many have you researched to create account-level insights? Created account-specific custom content? And so on.



# Metrics

## 2. Awareness

### Are the target accounts aware of your company and its solutions?

Ask a salesperson what they want from marketing, and one of the things they'll say is, "When I call into a new account, I want them to know who we are and what we do". They're asking for awareness – not broad-based untargeted awareness (the kind a consumer brand might build with a TV ad), but awareness at a targeted list of specific accounts.

Unfortunately, awareness is notoriously difficult to measure. The traditional way is a brand study that asks key contacts at target accounts questions such as: "When you think of Category vendors, which companies come to mind" (unaided), or "What adjectives come to mind when you think of Company?" (aided).

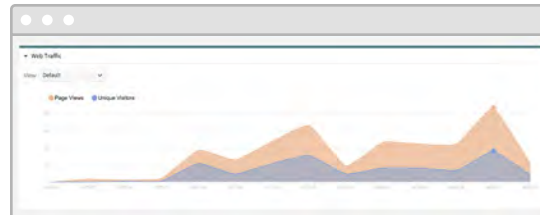
These studies can take time and cost thousands of dollars, so you need other ways to measure awareness.

### Traffic

One fast and cost effective way to track awareness is by measuring web traffic from target accounts. This is accomplished by using reverse IP lookup to figure out the domain names associated with the IP addresses of your website visitors, and then matching the domain names to your accounts.

You could build this yourself, but there are a variety of tools (including Engagio) that can do it for you.

If web traffic from target accounts is going up, then it's a good sign that your ABM efforts are increasing awareness – especially if you can show that it's going up faster than at the non-targeted accounts.



Increasing web traffic from target accounts is a sign of increasing awareness.

### Interactions

Another way to measure basic awareness is to track the number of target accounts that have had any interaction with your brand recently. If a specific account has no emails opened, no events attended, and no phone calls accepted in the last three months, then it's reasonable to say that nobody from that account is aware of you.



Track the number of target accounts that have had interacted with your brand in the last few months.

# Metrics

## 3. Engagement: Step 1

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**Are the right people at the account spending time with your company, and is that engagement going up over time?**

Engagement has been used to describe so many things that it's almost lost its real meaning. But the concept endures because it describes something fundamental about the customer's connection to your brand:

**Higher degrees of engagement mean a deeper commitment. More time. More emotion. More of a relationship. More activity – such as buying and advocating.**

In short: engagement matters.

But, like awareness, it's not easy to measure engagement completely. You can use surveys to ask the customer how well he or she agrees with statements such as "Company always delivers on their promises", "I feel proud to be a Company customer", and "Company is the perfect company for people like me."

But surveys are time consuming, expensive, and never give complete coverage across accounts. So it's worth finding another way to measure engagement.

### It's about time

At Engagio, we use the **number of minutes** that someone spends with your brand as a reasonable way to track engagement.

These minutes should cover when they respond to your marketing programs, but also when people interact socially, use your product, and talk with the sales team. By combining these interactions at the individual and account level, you get a good proxy for engagement. Here are the steps:

1. Track activities
2. Match activity to accounts
3. Assign minutes to activities
4. Update your organizational heatmap
5. Aggregate engagement at the account-level
6. Identify marketing qualified accounts (MQAs)

Let's drill down:

### Step 1: Track activities

Begin by tracking all the meaningful activities for each of the contacts at your target accounts. Typically, the data sources will include:

- **Website:** Visits by account, using reverse-IP mapping.
- **Marketing automation:** Email opens; event attendance; content downloads; interesting moments; and so on.
- **CRM:** Activities and tasks; campaign membership.

More advanced data sources include:

- **Product:** Minutes spent using various features of your product.
- **Social:** Who follows you, shares and retweets your content, comments on your posts, and so on.
- **Sales interactions:** Tracking when sales spends time with target accounts – the hardest but one of the most valuable sources.

Many sales tools track interactions (such as email) as activities in the CRM tool, so those are straightforward to pull in. You can also connect to a sales rep's calendar and email to track when they are having meetings and other interactions with target accounts.

# Metrics

## 3. Engagement: Steps 2 & 3

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### Count the meetings

A great ABM metric is to count the number of meetings scheduled and held at target accounts. Just make sure you have in place a good mechanism to track these!



### Step 2: Match activity to accounts

Take each lead's activity and identify which account he or she should be part of. You can do this manually using a simple match on email domain, or automate it with technology like Engagio that uses more sophisticated methods for Lead to Account matching. Getting this right is a critical step in all ABM analytics.

### Step 3: Assign minutes to activities

Now take each of the various activities and assign a number of minutes to each. You often won't have the exact number of minutes, so it's OK to use estimates for each activity type, such as:

- Email open: 1 minute
- Content download: 10 minutes
- Webinar attendance: 30 minutes
- Dinner attendance: 2 hours

### Visualize all the activities into an account timeline

It's often useful to map all the key activities for a given account into a visual timeline. This can be especially valuable to have during a Quarterly Business Review to show exactly how marketing has touched the account. It's also useful when a deal closes to look back and see which touches helped influence the account.



# Metrics

## 3. Engagement: Step 4

### Step 4: Create an organizational heatmap

Remember the People Map from the Coverage section? You can use the same visualization to track which parts of the organization are engaging with you. Add up the number of minutes spent in total from each cell of the matrix, and color code for their level of engagement.

When done, you'll have a Heatmap for the account. You can also do this for a group of accounts to see broader trends.

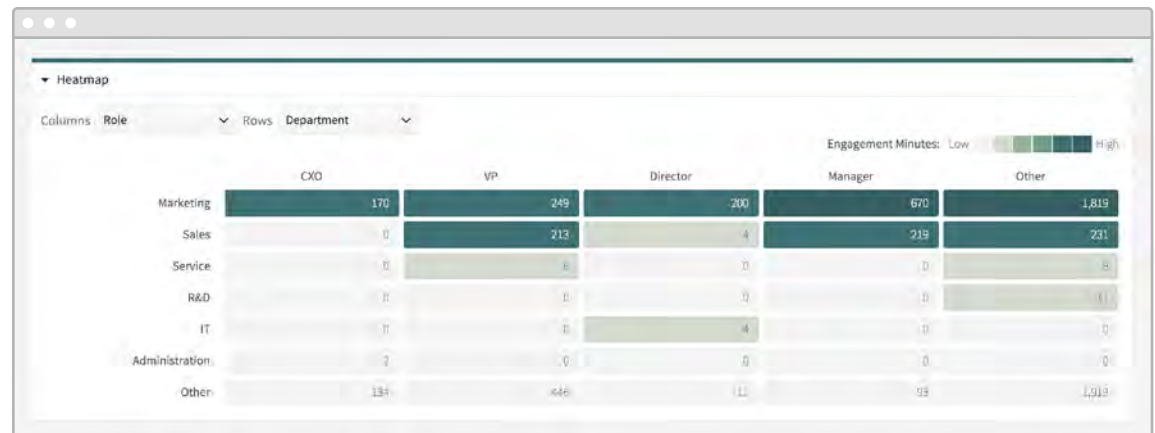
With this, you can know which personas are most engaged (darker areas on your heatmap) and where you need to deepen engagement (lighter spots). You can also:

### See where you may need new content to engage different audiences

In the heatmap shown here, the company engages primarily with the marketing department, and secondarily with sales. Interestingly, they're connecting mostly with lower-level marketing staff but in sales they connect more with executives.

### Identify potential blind spots

Although it's always important to focus on your top contacts at an account, it's also important to have the necessary breadth of relationships. By comparing an account's heatmap with your "ideal" heatmap, you'll be able to see where you may be missing engagement from a key persona.



Use the Heatmap to see which parts of the organization engage with you, and where you may have blind spots.

# Metrics

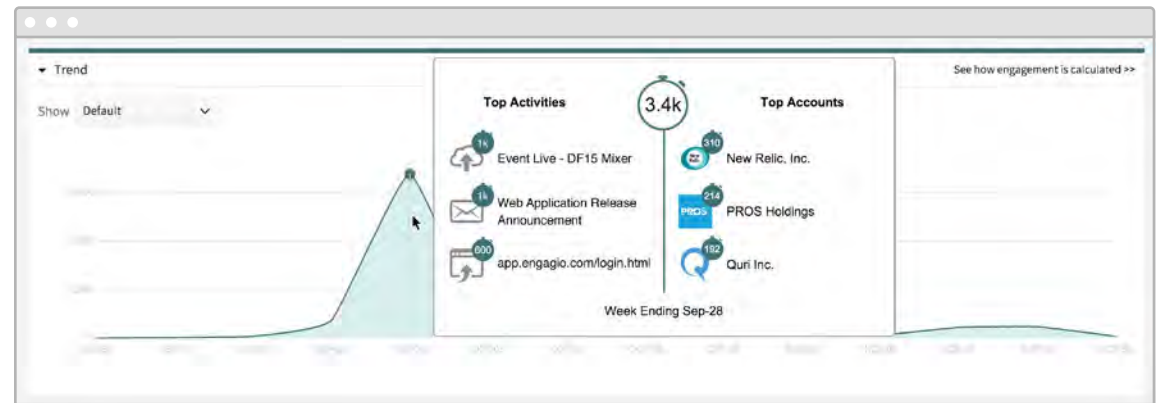
## 3. Engagement: Step 5

### Step 5: Aggregate engagement at the account-level

Next, combine the minutes for all the contacts at an account to come up with a measure of aggregate account-level engagement. This combination is typically not a simple sum or average. For example, sometimes you'll want to give more weight to senior or important contacts.

From there, track the aggregate engagement trend over time, similar to an electrocardiogram (EKG) chart for account health.

Imagine being able to go to the head of sales to show that target accounts spent 4,289 minutes engaging with marketing activities this quarter, up 122% from only 1,932 last quarter. And imagine being able to drill into the data to show the specific sales territories, industry segments, and personas with the biggest growth. This is certainly a sign that things in the middle of the funnel are progressing in the right direction!



One of the best ways to demonstrate marketing's impact in ABM, especially in the middle of the funnel, is to show increased engagement from target accounts.

# Metrics

## 3. Engagement: Step 6

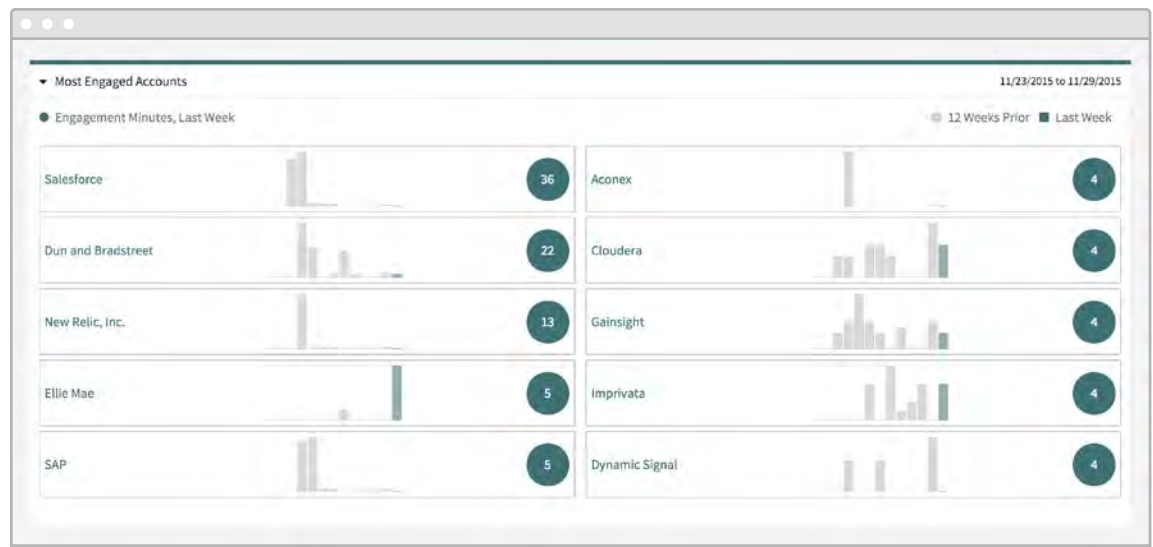
**Step 6: Identify marketing qualified accounts (MQAs)**  
 Finally, it's useful to identify which are the most engaged accounts and alert sales about any accounts whose engagement is spiking up or down versus their recent trend.

At Engagio, we think that account-level engagement is a better indicator of potential buying activity than individual lead scores. That's why we use a new metric, the Marketing Qualified Account (MQA) instead of the person-based metric, Marketing Qualified Lead (MQL).

**Definition**  
**Marketing Qualified Account (MQA):**  
 An account (or discrete buying center within an account) that has reached enough aggregate engagement in a given time period to merit a sales outreach.

When you accurately track the minutes from your Account Based Marketing activities, you'll understand how target accounts are engaging. Over time, you'll gain valuable information about how engagement minutes correlate with your most profitable accounts – so you can refine your strategies and create even more engagement.

Identify the accounts with the most engagement, and with big spikes up or down from their recent trend.



# Metrics

## 4. Reach



### Are marketing programs reaching target accounts? How much waste is there?

Every marketer wants to know which programs are working. But, historically, it's been hard to know which programs do the best job of reaching your specific named accounts. That's why we use these additional program metrics to track ABM success:

#### Successes

A success is defined for each program channel. For a webinar, success is attending the event; for a content program, it is downloading the content; and so on. (Your definitions may vary.) Once successes are defined, track the number of successes that each program has at your target accounts.

#### Coverage

This is the percent of target accounts that have a success in a given program. It is a measure of how broadly the program reaches your target accounts.

#### Focus

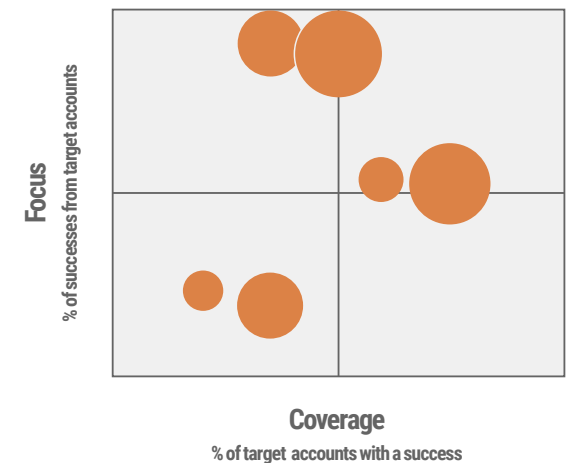
This is the percent of all program successes that come from your target accounts. It is a measure of how efficiently the program reaches just your targets (or inversely, how much "waste" the program has in terms of reaching non-targets).

#### Example Calculation

Say you ran a webinar with 500 total attendees, and of those, 50 attendees work at companies that are target accounts. Now, since individual attendees may work at the same company, let's say that those 50 attendees come from a total of 25 different accounts. Finally, let's say that you have 100 total target accounts. In this case, your metrics are:

- **Successes:** 50 (individual attendees from target accounts)
- **Coverage:** 25% (25 accounts with a success, out of 100 total)
- **Focus:** 10% (50 attendees from target accounts, out of 500 total)

In general, programs with good coverage and/or good focus will do a better job of achieving your Account Based Marketing goals.



# Metrics

## 5. Influence

**How are the ABM activities improving sales outcomes such as deal velocity, win rates, average contract values, retention, and Net Promoter Scores?**

Every marketer ultimately wants to know how much revenue is driven by each program. But long sales cycles with many touches can make a true attribution model difficult.

In ABM we need to look for correlations between the activities and key sales outcomes. To do this, mine your data to find **influence insights** such as:

“Accounts in the top 25% of engagement have 18% faster sales cycles than those in the bottom 25%.”

“Accounts that attended this webinar ended up with 5% higher contract values than those that didn’t.”

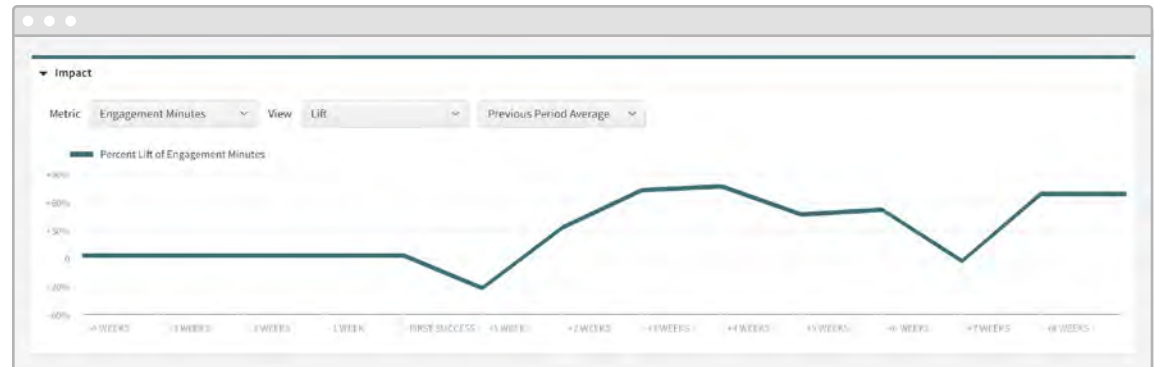
“Accounts that attended that dinner had 16% more movement to the next opportunity stage over the next three months.”

“Accounts with more than three engaged contacts yielded 11% more opportunities.”

“Accounts with the top 10% of engagement are 117% more likely to be Net Promoters than average.”

Even if correlations don’t always imply causation, these insights are still a very strong way for marketing to show why increasing engagement and running Account Based Marketing programs should matter to sales executives and the C-suite.

Look for programs that create a lift in the key metrics that the company cares about, such as pipeline and net promoter score.



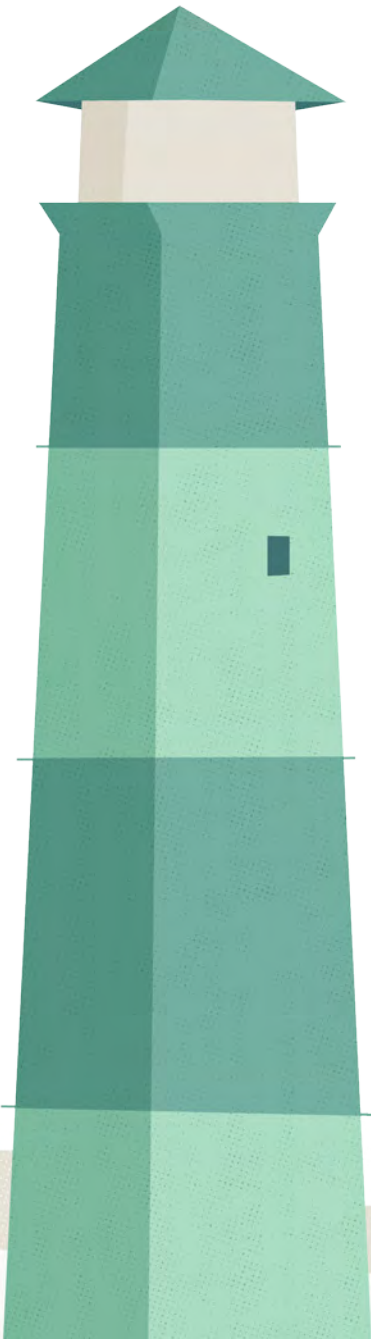
# Metrics Conclusion

**One of the key sources of misalignment between marketing and sales is the disconnect between the way the two teams measure success.**

One of the benefits of Account Based Marketing is how it brings the two teams closer, aligning focus on a specific list of named accounts. By evolving your metrics in the manner discussed here, marketing and sales can begin to speak the same language and come even closer together as a result.

For some, the movement away from tried and true lead-based metrics may feel unnerving, but if you're going to embrace ABM, the change and its implications are unavoidable: an ABM program without ABM metrics will always be judged by the wrong yardsticks.

From	To
People	Accounts
Leads	Opportunities
Personas	Specific buyers
Quantity	Quality



## Part IV

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# Implementing ABM: the road to success

## Part IV

# Implementing ABM: the road to success

Account Based Marketing is an idea whose time has come. It's also a sound strategy that's been proven to work for every kind of B2B company looking to land the big accounts.

But just because it makes sense doesn't mean it's easy to turn a traditional sales and marketing operation into one that understands and executes ABM well.

This section is about making ABM work in the real world. It's about culture and change. And about the people, processes, technologies and attitudes that make ABM programs successful.

**We're grateful to Kathy Macchi, managing partner at ABM consultancy Inverta, for her contribution to this section – it harvests her front-line experience as a top ABM transformation expert. Thanks Kathy!**

### **A new discipline within your existing operation**

Account Based Marketing may or may not replace traditional demand generation in your company. Instead, it can complement normal lead gen activities, taking your selected accounts out of the normal marketing flows and cadences and giving them special treatment.

So moving to ABM may or may not mean a total transformation of your revenue engine. You might just create a new team that works alongside the existing ones, using content and campaigns from the mainstream programs as appropriate but focusing on named accounts.

### **Scale, scope and strategy**

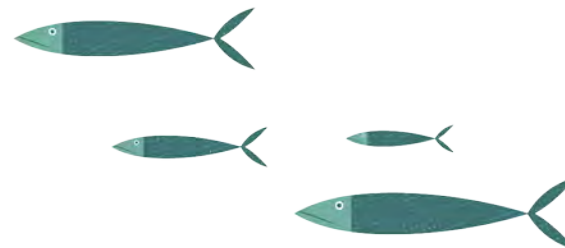
There are many flavors of ABM. How you implement your ABM program will depend largely on these dimensions:

**Scale** – How many accounts will be in your program? How big are the deals? What resources are available?

**Scope** – Will you start with a small pilot? Will this be an intensive, high-touch approach for a few big accounts or a more scalable effort targeting more companies?

**Strategy** – Is this mostly about growing existing accounts, winning new logos or both?

Where you decide to be on the ABM intensity spectrum should guide your decisions about the implementation issues discussed below. The answers won't be the same for every company.





# Sales and Marketing alignment

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## Making alignment happen

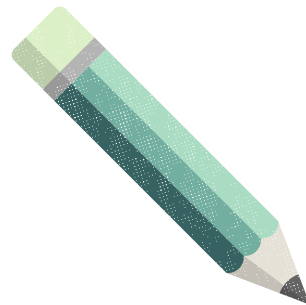
The words 'sales and marketing alignment' are often said but are far from easy to achieve.

That's because, for generations, sales and marketing people have lived in different worlds, spoken different languages and been measured by different yardsticks. Sales is from Mars, marketing is from Venus.

In ABM, it can't work that way.

## **ABM demands a level of alignment that sales and marketing have rarely exhibited before.**

If you don't feel your sales and marketing teams are ready for this level of collaboration and communication, you need to solve that before starting out on the road to ABM.



## The ABM Alignment Checklist

- Get senior executive buy-in. Your ABM team will need their understanding and protection.
- Position the program as a new, collaborative and ongoing approach to acquire and expand big accounts, not as 'the next big marketing campaign'.
- Make sure the account execs, SDRs and marketers are 100% committed to this strategy. Anything less is a recipe for friction.
- Don't just agree on the accounts to target, agree on the criteria for choosing accounts and the governance about when to add or remove accounts.
- Agree on the fraction of all resources that will go to your ABM accounts, perhaps starting with a pilot program.
- Agree on short- medium- and long-term metrics that everyone will track together. And agree on the metrics that don't matter. Document this.
- Create an Account Plan for each Tier 1 account – a product of sales and marketing together.
- Hold weekly meetings in the early stages, relaxing to monthly meetings as the machine starts to hum.
- Let everyone know what's happening – tell the rest of the sales and marketing team about what you'll be doing and how they can help. Market your marketing.

## Sales and Marketing alignment (cont'd)

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### Talking to Sales

If you're in marketing and approaching the sales team to recruit them to your ABM vision, consider these tips:

- **Outline the need for change** – maybe revenue is slowing; or wallet share is declining; or there's an untapped opportunity; or growth from big accounts is a necessity. If the status quo is working, why change?
- **Show what's in it for them** – a marketing team dedicated to helping them win the big deals instead of throwing thousands of low-quality leads their way.
- **Make the ABM journey clear** – not just that you'll be targeting big accounts together but how (this guide should help!).
- **Make a commitment to their success** – show how you only win if you win together.
- **Make sure their bosses are on board** – and that the metrics and timescales for ABM are different from ordinary selling.

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### Talking to Marketing

If you're in sales and approaching the marketing team to get them on board, remember to:

- **Sell the need for change** – show that the lead-centric view is missing major revenue opportunities.
- **Show what's in it for them** – a sales team willing to work side-by-side and an opportunity to be associated with major wins.
- **Show what ABM looks like for marketers** – and how it's different from traditional demand generation.
- **Commit to working together** – show that you're in it for the long haul, not just the quarter.
- **Make sure the senior execs are in** – and they really won't be measured by lead volume.

# ABM red flags

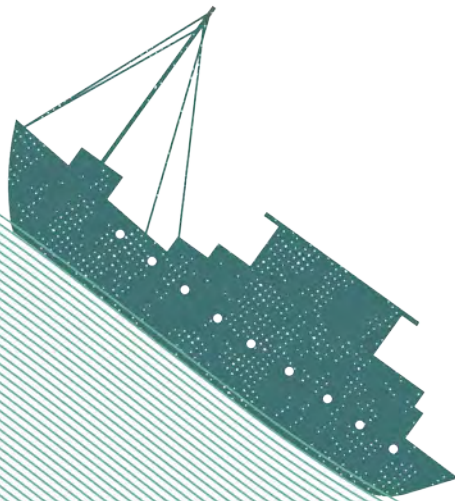
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## Common ABM warning signs

We've seen ABM programs fly and we've seen them flop. As you implement your ABM program, keep an eye out for these warning signs:

- The account exec views ABM as a tactic to fit in with the normal way of selling.
- Top management sees the ABM program as a sales drive or campaign.
- Senior sales execs don't see it as a long-term investment – they just want to hit this quarter's numbers at all costs.
- Any of the team members think they know all they need to know about the account.
- The account exec thinks he or she knows every single person that matters inside each account.
- The ABM sponsor leaves the company or an acquisition shifts priorities.
- The change management part of the journey is under-valued.
- The ABM accounts are still being bombarded with the mainstream lead gen programs.

**If you see these things happening, speak up!  
You can still keep this thing on track.**



# Buy-in and funding

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**ABM programs can't happen without resources. And resources don't get marshaled without senior executives making it happen.**

## Executive support

Your ABM program must find support at the executive level to be successful.

Often, the spark comes from a change in the company or market that affects fundamental revenue performance:

- Sales to existing major accounts are slowing or existing revenues are declining.
- Share of wallet within large accounts is not known or competitors are gaining share.
- Account teams aren't stretching beyond established comfort zones and developing business in new areas.
- Growth in (or retention of) strategic accounts is a priority.

Many sales leaders are finding that hiring more inside and outside reps to hit their revenue goals isn't working any more. That makes senior executives open to try a more strategic approach to account planning and key account relationship building.

Since an ABM approach mandates significant changes in the practices of your sales and marketing teams, this senior sponsorship is critical.

## Funding

Account Based Marketing is a marathon. That means you need to get proper funding for a program that won't deliver clear revenue immediately – possibly for a long time.

If you hide this fact when you make your business case, you're putting a time bomb inside your ABM program. Instead, make sure executives all understand the timescales and the metrics you'll be using to ensure you're making progress towards revenue.

The companies who stay with their ABM strategies and track the right metrics invariably show significant return on their investment. But success is not measured in weeks (or even months in many cases).

Marketing typically funds the ABM programs initially, and funding for technology typically comes from the general marketing tech budget (unless it is something specifically for ABM such as account insight).

By year 3 of an ABM program, however, many sales executives tend to be willing to fund the campaigns that benefit their accounts. They've seen the results and want more.

# The right people

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ABM is a resource-intensive, cross-functional strategy. The team you choose will make or break your early ABM efforts and determine whether ABM ultimately gets scaled up or held back.

On both the sales and marketing side, great ABM practitioners are often the best candidates for future leadership roles. ABM is the fast track.

## Skill sets

Successful ABM practitioners are collaborative, data-driven leaders with a strategic orientation and top-notch communication skills.

## ABM salespeople

- Intelligent and disciplined with a systematic approach
- Goal-oriented but patient
- Great listeners and users of information
- Respect for marketing peers
- Openness to new processes
- Organizational networkers
- Natural followers of The Challenger Sale

## ABM marketers

- Seasoned, senior marketers
- Can hold their own with account executives
- Well-rounded team players
- Business knowledge and consultative abilities
- Solution marketing experience (to focus on insight), and/or field marketing experience (to focus on interaction and orchestration)
- Leadership and relationship skills to pitch and manage campaigns
- Strong project management

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“ABM marketers have to understand how to take account information – behavioral, profile, contact and predictive data – and turn it into insights that are relevant to different people in the organization.”

Megan Heuer  
SiriusDecisions

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## Business curiosity

The best ABM people are naturally curious about the business of business. They're interested in the complex value chains and relationships between the many different players in a market.

**The ABM journey is a constantly steepening learning curve. A natural interest in the dynamics of business is important.**

# Roles and responsibilities

## The roles and responsibilities of your ABM Team

There can be many members of an ABM account team, but generally only one is responsible for managing the ABM plan: the account marketer. The account marketer, in concert with the sales account leader, coordinates the activities of the team.

The core ABM team typically includes:

- Account executive and sales team members
- Solutions and services consultants/delivery personnel
- Marketing representatives from solutions, industry, communications, field
- Professional service and support organizations

Role	Responsibilities
ABM Marketer	Spearheads the ABM project • Helps collect insight • Runs the initial ABM alignment process • Develops customized value propositions, messaging docs and playbooks • Orchestrates all marketing interactions • Tracks the metrics and communicates the program's successes • <b>Becomes a Trusted Educator</b>
Account Executive and sales team members	Manages relationship with Executive Sponsor • Responsible for driving the plan forward with the team and at the account • Team meetings with internal staff and with the customer • Helps shape the ABM strategy and each account plan • Aligns all conversations around account needs • <b>Becomes the customer's Trusted Advisor</b>
Sales Development Reps	Helps research the account and build contacts • Reaches out to the account to build relationships • Crafts account-specific emails and messages • Nurtures relationships over time • Supports the account executive as needed
Solutions consultants/delivery personnel	Provides insight into what's happening at the influencer and operational level • Ensures the 'technical/operational' programs and messages are relevant and resonating • <b>Provides Trusted Information to the customer</b>
Field Marketer	Works with the ABM marketers to execute campaigns at the local level
Corporate Marketer	Works with the ABM marketer to collaborate on corporate communications and campaigns • Understands what to customize for the customer and what programs can be included in the account's communication strategy
Industry Marketer	Provides insight into the industry view
Product Management/Marketer	Provides product roadmap insights to the account team and/or customer • Works with the ABM team to understand if custom solutions are required and what's possible
Professional Services Representative	Similar to the Solutions/Delivery personnel • The PS team typically has more insight into how the technology is used, what works, what doesn't and is incredibly valuable on the ABM team • Can help with how to 'get the most' out of current investments/technology from your company
Support Representative	Provides reports and can escalate support items when they become consequential to customer satisfaction scores

# Getting started

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## ABM processes

### Getting Started: the pilot

Many companies who have deployed ABM successfully started their journey with a pilot. The benefits are clear:

- Learn how ABM works for your specific kinds of accounts
- Lower the risk of your early efforts
- Iron out any issues before you scale
- Earn stronger executive and stakeholder support
- Lessen the change management challenge

The size of your own pilot will depend on how many accounts a single rep can handle, but we've seen pilots that are structured in ways like this:

- One sales rep and one marketer targeting five accounts
- Three reps and a marketer targeting one industry sector
- A full ABM commitment but in one territory or region
- A full ABM program for one product line

**It usually makes sense that the accounts you select for your pilot are in the same industry, so you can share the insight more easily.**

# Your ABM collaboration processes

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The nature and frequency of your ABM team interactions will depend on your strategy, the location of your team members and your management style. Decide on how often you need to meet and pick specific goals for each meeting.

A typical ABM collaboration cadence might look like this:

**Weekly team catch ups** – like agile sprints, short updates from each team member on what’s changed since last week and actions for this week.

**Monthly ABM “win rooms”** – one hour sit-down meetings reviewing metrics, covering progress and setting next actions on all fronts.

**Quarterly Intensives** – review the entire program; consider changes to the account list; deep dive into metrics; make changes to action plans...

Collaboration tools can include everything from Google Docs and Hangouts to cloud collaboration tools like Trello, Slack, Basecamp and Asana.

Opening a project or channel for each target account creates a place for all relevant activities and content to live.



# Managing change

## Active change management

Account Based Marketing is a new way of approaching large opportunities. And any new way of working is essentially a change management challenge.

The companies who recognize the need for active change management to guide their ABM programs are often the ones who see the quickest success.

Changes in things as fundamental as mindset, behavior, communication and measurement don't just happen by themselves. And if they're not constantly attended to, people will revert back to their old ways of working.

## ABM Change Management Checklist

- Sell the need for change** – to the ABM team and the wider sales and marketing organizations.
- Get the input of every team** – before rolling out your strategy, listen to the people who will be executing and enabling it.
- Communicate often** – regularly update key executives and the entire sales and marketing team to explain how it's going and why; remind them of the goals each time.
- Use your metrics** – ABM success is never instant. Use your coverage and engagement metrics to show progress.
- Spot resistance** – don't ignore it; listen hard and get people on board.
- Meet regularly** – to prevent slipping back to old ways of working.
- Celebrate success** – when it comes, make sure people know about it.



# The role of marketing

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## Marketing

One of the biggest changes happens on the marketing side, where a department used to being measured by number of leads generated is now measured by quality of engagement with targeted accounts.

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“Management often has a difficult time justifying a full-time marketer focused on 3-5 ABM accounts that might help generate 20 new contacts and 5 opportunities when a junior marketer may create 500 new contacts and 100 opportunities. Of course, the value between those scenarios is vast, but the change in mindset is significant.”

Kathy Macchi  
Inverta

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Don't underestimate this change. And don't expect it to happen simply because you announced the new goals and metrics.

## Field marketers

Field marketers are often called upon to help support ABM accounts in their regions. They're the feet on the street and know about the local account dynamics. Make sure they're included in the initial ABM strategy sessions so they're on board when you need them. You'll also need them to understand that the ABM accounts can't be included in their general marketing campaigns.

## An ABM Helpdesk

As ABM grows, a helpdesk to serve the requests from the field sales and marketing teams may be needed. Fast access to customer references, white papers on an industry issue or subject matter experts will start to roll in — often with very little warning and with an “I-need-it-yesterday!” urgency.

“ABM puts an onus on marketers to understand more – not just about the world that sales lives in, but to do a better job of understanding the world that customers live in.”

Megan Heuer  
SiriusDecisions

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# Sales and technology

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## Sales

The biggest change that ABM demands of the sales team is to embrace the new relationship with their marketing teammates.

In traditional demand generation, marketing throws leads over the fence for sales to chase. In ABM, there is no fence. The collaboration is close, constant and totally focused on defined, account-specific objectives.

The key here is to start with account reps who are open to this kind of relationship. Once you've got that, the ongoing progress of each account reinforces the effectiveness of the ABM approach.

In well-run ABM programs, the only challenge is that more reps will want to be included than the program can accommodate!

## ABM technology

You can run a successful ABM pilot with very little additional technology. But technology can be hugely useful when you want to scale your program beyond a few accounts.

Today, however, few marketing tools or platforms have been designed from the ground up to have an account-based view of the world. As a recent ITSMA report states, "It requires creative thinking to adapt tools that were not necessarily designed to support an account-based view of the world."

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"Use ABM either as an opportunity to leverage current tools and practices effectively in individual accounts or as a spearhead for investing in and experimenting with some of these tools."

ITSMA, Marketing Technology for ABM

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## The integration challenge

Your ABM technology stack shouldn't be a silo. Instead, you'll need to integrate it with your core marketing platforms – chiefly your CRM and Marketing Automation tool – and possibly with systems such as digital advertising, social listening and business intelligence.

Some of these integrations will be fairly straightforward, using the existing APIs of the software involved. Others may need some custom integrations and the involvement of systems integrators or your IT team.

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"Regardless of which technology tools you implement and apply to ABM, make sure that they are well integrated. Otherwise, their benefits will be substantially diminished."

ITSMA, Marketing Technology for ABM

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# The ABM Market Map

The ABM Market Map identifies vendors for seven distinct ABM activities:

	<b>Selection</b>	<b>Contacts</b>	<b>Insights</b>	<b>Content</b>	<b>Interactions</b>	<b>Orchestration</b>	<b>Measurement</b>
	Identify and prioritize target accounts, align on resources by Tier 1, 2 and 3	Discover contacts and map to your accounts, ensure quality data	Understand what is relevant and resonant at account (triggers, priorities, etc.)	Create account-specific content and messaging that reflects insights	Manage 1:1 account-specific interactions in channel – events, outbound, digital (ads, web)	Synchronize interactions into coordinated plays that align to account plans and goals	Show impact of ABM efforts: coverage, awareness, engagement, reach, impact
<b>Predictive</b>	Lattice EVERSTRING sense leadspace MINTIGO	Datanyze NETPROSPEX salesforce data.com zoominfo DiscoverOrg LeadGenius REACHFORCE ABERDEEN GROUP	dun & bradstreet InsideView LinkedIn AVENTION agent BAO Spiderbook	SEISMIC DOCURATED IDG FREYA NEWS momentum	<b>Ads</b> DEMANDBASE Terminus vendemore LinkedIn kwanzo	<b>Human Email</b> ENGAGIO SalesLoft Outreach <b>Lead Gen</b> integrate MadisonLogic	ENGAGIO LeanData <b>Complementary</b> Marketo eloqua salesforce HubSpot
	<b>Web</b> Marketo Optimizely GETSMARTCONTENT evergage Triblio	<b>Events</b> event Attend.com Eventbrite <b>Direct</b> PFL					

# Measuring and collaborating

## Metrics and reporting

One of the most important technologies you'll need for ABM is a platform for measuring your ABM activities, scoring engagement and reporting on the results.

Because they don't have an account-based view of the world, current CRM and Marketing Automations platforms are unlikely to be the right place to manage your ABM metrics.

Your choice is to create your own metrics and reporting dashboards, using generic business intelligence tools (divorced from actual ABM management); or to use Engagio, the first measurement and management platform built specifically for ABM (forgive the shameless plug).

## Using non-ABM technologies

Some of the processes in your ABM program will be able to leverage tools that were not designed exclusively for ABM:

- **Collaboration tools** will help align sales and marketing around key accounts.
- **Knowledge management software** may help collect, organize and share insights on key accounts.
- **Content management and curation platforms** may help your teams manage the creation of customized content.
- **Personalization tools** for web and email can help deploy your ABM treatment strategies in these channels.
- **Social media monitoring tools** can feed your insight programs.



# Part IV Conclusion

## ABM critical success factors

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**As with any change in any company, implementing ABM is a challenge. But if you take the time to get the critical pieces in place – and actively manage the change – success will follow.**

### ABM Must-Haves

- Strong and visible executive sponsorship
- Tight alignment between sales and marketing
- 360° agreement on goals for the ABM program
- Robust account selection process
- Careful ABM team selection
- Clear and agreed metrics with consistent reporting
- Clarity of roles and responsibilities
- A regular collaboration cadence
- Patience!

## Conclusion

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An idea  
whose time  
has come

# Conclusion

## An idea whose time has come

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Winning major deals in B2B markets is never going to be easy:

**You're selling complex solutions** into big organizations.

**No single person can simply pull the trigger on a deal** without consulting an interconnected matrix of people, each with his or her own perspectives, problems and prejudices.

**Your competitors are working just as hard as you are** to win every piece of business, especially the biggest deals in the biggest companies.

But, as a vendor, you're not simply a victim of these forces; you can take concrete, measurable steps that dramatically increase your chances of winning the biggest, most attractive deals in your market.

**That's what Account Based Marketing is all about:**

**Focusing** unprecedented time, budget and resources on a select few accounts, instead of spreading your resources equally across all.

**Aligning** your sales and marketing efforts more closely than ever before.

**Working** hard to intimately understand the needs and challenges of each contact inside your chosen accounts.

**Designing** clear, sharp, goal-driven plans and playbooks for each account.

**Orchestrating** coordinated programs of communication with the people who matter most.

**Measuring** your coverage inside each account and their increasing levels of engagement with you.

It's a new discipline that assembles the right people, processes and technologies into a well-oiled machine that's designed to scale the toughest mountains in your world: the biggest, hardest-fought deals that make or break companies like yours.

**At Engagio, we're completely convinced that ABM is the single most important opportunity facing every B2B company.**

We hope that this Guide has helped you to understand the importance of ABM, the strategic essentials and the tactical implications.

We also hope it's motivated you to make the leap to ABM from your current lead-centric demand generation world – maybe starting with a pilot, then ramping up to a full-fledged ABM program.

Finally, we hope it's convinced you that you don't have to take this journey alone. That there are at least a dozen excellent companies with real ABM experience – in everything from predictive analytics and data enhancement to personalization and retargeting – who stand ready to help. (We're one of these but far from the only one.)

You're at the start of something big in your career. This is important. This is exciting. This is ready now – for you.

**Let's do it.**



# 'Thank you' doesn't really express our feelings here

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We couldn't have written this guide without the time, talent and generosity of a very special group of people: the pioneers of Account Based Marketing.

They're working across the entire field, looking at it from every angle: vendors, practitioners, analysts, journalists and consultants.

They're not just experts in ABM, they're the people turning it from an idea into a powerful, proven discipline. All united by a real passion for this lightning-in-a-bottle we call ABM – and an unshakeable conviction that it will help our clients do things they could never do before.

It's also a remarkably collegial group that we're proud and honored to call friends. To these people (and the many people working with them), we say...

## Thanks

**Craig Rosenberg** TOPO  
**Megan Heuer** SiriusDecisions  
**Jeff Sands** ITSMA  
**Doug Bewsher** Leadspace  
**J.J. Kardwell** EverString  
**Kathy Macchi** Inverta  
**Sangram Vajre** Terminus  
**Jason Jue** Triblio  
**Henry Schuck** DiscoverOrg  
**Johan Sundstrand** Freya News  
**Maria Pergolino** Apttus  
**Donal Daly** TAS Group  
**Rishi Dave** D&B

A more complete (but far from comprehensive) list of experts is below, but we wanted to call these guys out for their immense help in creating this guide – and this market.

**Thanks guys!**

# ABM experts

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## Analysts and journalists

**Craig Rosenberg** TOPO  
**Megan Heuer** SiriusDecisions  
**Matt Senatore** SiriusDecisions  
**Jeff Sands** ITSMA  
**Bev Burgess** ITSMA Europe  
**Mark Ogne** Demand Metric  
**David Raab** Raab Associates  
**Joel Harrison** B2B Marketing

## Predictive Scoring

**Doug Bewsher** Leadspace  
**J.J. Kardwell** EverString  
**Jacob Shama** Mintigo  
**Amanda Kahlow** 6Sense  
**Sean Zinsmeister** Infer

## ABM Advertising

**Peter Isaacson** Demandbase  
**Christopher Engman** Vendemore  
**Sangram Vajre** Terminus  
**Mani Iyer** Kwanzoo  
**Stephanie Kidder** Azalead

## Content

**Johan Sundstrand** Freya News  
**Fergal Glynn** Dourated  
**Hana Abaza** Uberflip

## Personalization

**Jason Jue** Triblio  
**Mike Telem** Marketo  
**Marc Romano** Seismic

## Practitioners

**Dorothea Gosling** CSC  
**Maria Pergolino** Apttus  
**Jason Seeba** Bloomreach  
**Christelle Flahaux** MapR  
**Amalia Gonzalez-Revilla** Guidewire  
**Monica McDermott** GoodData  
**Rozanne Bonavito** Aria Systems  
**Lisa Joy Rosner** Neustar  
**Shari Johnston** Radius  
**Rob Israch** Tipalti  
**Kirk Crenshaw** GetFeedback  
**Heidi Bullock** Marketo  
**Robin Tobin** Adobe  
**Mike Cichon** ThreatMatrix  
**Gabe Paley** InsightSquared  
**Kelvin Gee** Oracle  
**Dannielle Beaupré** Siemens PLM  
**Adena DeMonte** Keas  
**Meaghan Sullivan** SAP

## Data Players

**Mark Godley** HG Data  
**Rishi Dave** Dun & Bradstreet  
**Henry Schuck** DiscoverOrg  
**Ben Sardella** Datanyze  
**Mike Kelly** MRP  
**Mike Burton** Bombora

## Other ABM Vendors

**Clive Armitage** Agent3  
**Adam New-Watson** LeanData  
**Amit Varshneya** Madison Logic  
**Daniel Gaugler** PFL  
**Scott Vaughan** Integrate  
**Dan McDade** PointClear

## ABM Consultants

**Kathy Macchi** Inverta  
**Alisha Lyndon** Momentum ABM  
**Jason Stewart** ANNUITAS  
**Matt Heinz** Heinz Marketing  
**Kelly Waffle** Markistry  
**Antoni Chumillas** Celsius International  
**Justin Gray** LeadMD

# About Engagio

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**Founded by Marketo co-founder Jon Miller, Engagio is an account-based outbound marketing platform for B2B companies with complex, enterprise sales.**

**Our ABM platform complements marketing automation platforms with account-centric capabilities, so it helps companies to engage target accounts, expand customer relationships, and deepen sales-and-marketing alignment.**

**Written by:**

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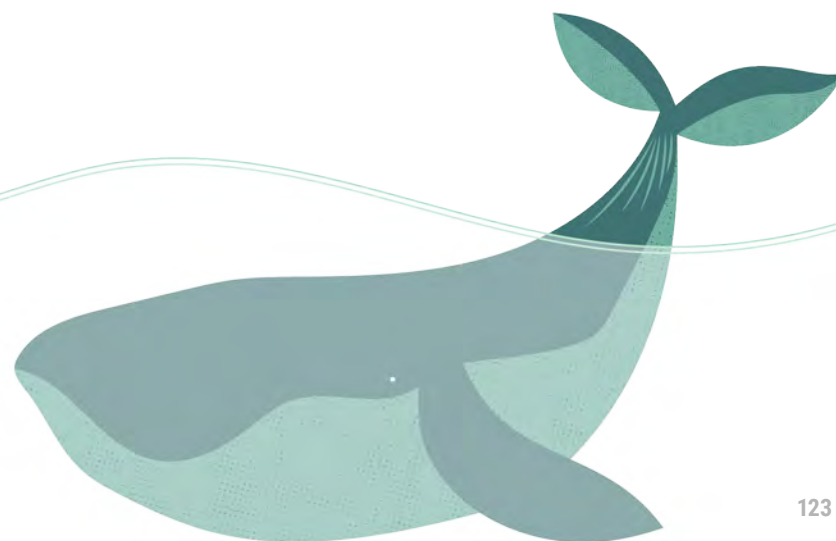
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