Developing an Account-Based Marketing Program

A Workbook to Define Your ABM Fundamentals

2nd Edition

B2B Marketing Academy HEINZ MARKETING INTEGRATE

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INTRODUCTION

Why we created this workbook, and how to use it

So, you're bought in. Ready to go. You understand how important account-based marketing is to your business's success. You're ready to start executing. But how do you turn a great idea and a good strategy into action? How do you translate good intentions into results?

This workbook was developed to be your guide. Providing proscriptive advice, worksheet templates, instructions, technology recommendations and more, we set out to specifically help demand generation and marketing operations practitioners better plan and execute the top-funnel aspects of their ABM strategies. In other words, this workbook, while comprehensive, does not cover all aspects of account-based marketing, but it should help jump start your ABM initiatives.

We expect these tools will give you a significant head-start, but that you'll still need to customize and personalize the worksheets and suggested tactics within to your specific industry, company and target accounts. If we can be of any help as you do that, please don't hesitate to reach out and ask.

> ***No matter where you are in the ABM process – evaluating, adopting or mastering strategies and tactics – there are fundamental demand marketing components you must develop, apply and optimize to drive results. If these aren't in place, it's nearly impossible to scale or deliver on your commitment to sales pipeline and revenue in this more precise marketing world.***

Scott Vaughan
CMO, *Integrate*

What is account-based marketing (ABM)?

A strategic approach marketers use to find, engage and nurture decision-makers at pre-defined accounts, account-based marketing (ABM) is making its way into B2B marketing plans everywhere. In many cases, it's becoming a "must have" line item for 2017. More than just an initial engagement tactic, a full-fledged ABM program also supports the post-sale customer lifecycle, using marketing's toolkit to contribute to the overall customer experience at targeted accounts.

The promise of ABM is efficiency and effectiveness. It decreases the amount of time and resources marketers spend engaging with less-valuable audiences, enabling them to target specific, proven accounts, generate higher-value leads and close a greater number of profitable deals. **Using an ABM strategy to target larger accounts can increase ACV (average annual contract value) by 171%, according to 2016 research by Topo and the ABM Leadership Alliance.**

ABM is only a smart strategy when done right – with the correct targeting, data and tools in place to manage and scale results. To execute an ABM program, marketers shouldn't typically abandon broader lead gen initiatives, at least not until they can deliver a full lead-to-pipeline-to-revenue model that's predictable with only named accounts. Otherwise, they risk depleting their pipeline while precluding the chance of identifying new target audiences (persona and account types).

Further, while selecting the right accounts is paramount for ABM success, marketers must also understand the needs and concerns of individuals on the buying committee. Therefore, a comprehensive ABM program requires the use of:

- Clearly defined goals
- A structured communication strategy between sales, marketing and the post-sale teams
- A fully developed content marketing plan
- A fairly sophisticated marketing technology stack
- Multiple, centralized lead sources that can distribute content to specific personas within named accounts
- Easy access to ABM prospect and program data to select and continuously adjust (in flight) the right mix of media and engagement tactics

Get the complete file of all ten ABM worksheets here.

- **Worksheet A:** ABM Readiness Checklist
- **Worksheet B:** Lead-Opportunity-Close Goal Model
- **Worksheet C:** Monthly & Weekly Progress Model
- **Worksheet D:** Role Assignment Table, ABM Team Roles
- **Worksheet E:** Account & Persona Development Table
- **Worksheet F:** Content Map by Buyer's Journey Stage
- **Worksheet G:** Content Map by Lead-Opportunity Stage
- **Worksheet H:** Account Planning & Lead to Account Mapping
- **Worksheet I:** ABM Technology Table
- **Worksheet J:** ABM Tech Vendor Checklist/Scorecard

Step 1

Determining If ABM Is the Right Fit

"ABM seems to be everywhere you look in B2B marketing right now. But this doesn't mean you should blindly dive in – that's a recipe for disaster. It's important to first take the time to identify whether ABM is right for your organization, as well as whether your organization is ready for ABM."

Scott Vaughan
CMO, *Integrate*

WORKSHEET A: ABM READINESS CHECKLIST

How to Use Worksheet A

Account-based marketing has been practiced by sales and marketing teams dating back to the 1960s. Yet marketers are now better equipped with the skills and technology required to identify, engage and convert decision-makers within targeted accounts earlier in the buy cycle, i.e., well before sales hand-off. ABM programs today are high-touch, with better levels of scale and tracking. Further, we're able to speed up the feedback loop and use data to refine our efforts, with less manual work.

While ABM is a hot topic in modern marketing circles, it may not be right for all businesses. Remember, your ABM strategy doesn't have to be all or nothing. You can apply an ABM strategy for your largest, most profitable accounts to go after, and then apply a more traditional leads-based marketing and sales model to higher volume, lower dollar accounts. How do marketers know when ABM is right for their organization? Here are some practical evaluation criteria for you consider when deciding if an ABM strategy is right for your company.

	Agree (enter "1" if yes)	Disagree (enter "1" if yes)
My product or service includes complex buying decisions which involve multiple decision maker(s), influencers and users.		
My product or service has a higher price point which requires sign-off beyond a credit card payment.		
The potential value of bringing on a new target account is strong, with a high lifetime value and a larger ROI payoff over time.		
My product or service requires a longer sales cycle, beyond several months, up to a year or more.		
My organization has (or can build) meaningful and targeted content to help support an ABM initiative.		
My company is (or can become) well-aligned across functions, including marketing, sales and success teams.		
My company, and leadership team, are tolerant of long-range ROIs. We understand the need to monitor short, medium and long-range metrics before making determinations about the success of a strategy.		
Customers find it challenging to purchase my product or service through a self-serve, ecommerce option, and usually need to talk with salesperson before buying.		
For each "Agree" answer, the formula assigns 10 points.		
If total = 50-80 points, ABM is right for your organization.		
If total = 30-50 points, you may want to consider ABM strategies inside your organization, or perhaps a partial ABM strategy.		
If <30 points, ABM is unnecessary within your organization, or only applies to a very limited number of accounts.		

Note: If you haven't yet downloaded the worksheets, you can ***download all ten here.***

Step 2

Developing Objectives & Success Metrics

All good marketing programs, including account-based marketing efforts, start with a plan that outlines and breaks down what pipeline volume is required to hit the sales goal.

The objectives of ABM are the same as those of traditional lead generation activities: drive pipeline and revenue. The difference is that ABM promises to do this more efficiently by allocating resources and budget to targeted accounts that are more likely to close and/or result in more profitable deals. This requires a change to the ways in which we set program goals and assign objectives to various organizational roles. The following worksheets are intended to help with each of these efforts.

WORKSHEET B: LEAD-OPPORTUNITY-CLOSE GOAL MODEL

How to Use Worksheet B

Use Worksheet B to set goals on a monthly or quarterly basis (or even pivot based on the number of sales required or the number of targets you have) – the customization of the model is up to you. The key, however, is developing your ABM program strategy with a clear sense for what's required of both sales and marketing to hit your organization's customer, revenue and profit goals at the end of the year.

Assumptions													
Mid-Market Average Selling Price (ASP)	$ 65,000												
Small Enterprise ASP	$ 120,000												
Large Enterprise ASP	$ 240,000												
Opportunity/Close %	25.0%	This is the percentage of qualified opportunities expected to close											
Lead/Opportunity %	5.0%	This is the percentage of leads expected to convert into qualified opportunities											
	Jan-18	**Feb-18**	**Mar-18**	**Apr-18**	**May-18**	**Jun-18**	**Jul-18**	**Aug-18**	**Sep-18**	**Oct-18**	**Nov-18**	**Dec-18**	**TOTALS**
Mid-Market Sales #	4	4	6	6	8	8	10	10	10	12	12	12	102
Small Enterprise Sales #	2	2	3	3	4	4	5	5	5	6	6	6	51
Large Enterprise Sales #	1	1	1	1	1	1	2	2	2	3	3	3	21
Total Sales #	6	6	9	9	12	13	17	17	17	21	21	21	169
Mid-Market Sales $	$ 260,000	$ 260,000	$ 390,000	$ 390,000	$ 520,000	$ 520,000	$ 650,000	$ 650,000	$ 650,000	$ 780,000	$ 780,000	$ 780,000	$ 6,630,000
Small Enterprise Sales $	$ 240,000	$ 240,000	$ 360,000	$ 360,000	$ 480,000	$ 480,000	$ 600,000	$ 600,000	$ 600,000	$ 720,000	$ 720,000	$ 720,000	$ 6,120,000
Large Enterprise Sales $	$ 120,000	$ 120,000	$ 120,000	$ 120,000	$ 120,000	$ 120,000	$ 240,000	$ 240,000	$ 240,000	$ 360,000	$ 360,000	$ 360,000	$ 2,520,000
Total Sales $	$ 620,000	$ 620,000	$ 870,000	$ 870,000	$ 1,120,000	$ 1,120,000	$ 1,490,000	$ 1,490,000	$ 1,490,000	$ 1,860,000	$ 1,860,000	$ 1,860,000	$ 15,270,000
Mid-Market Pipeline #	16	16	24	24	32	32	40	40	40	48	48	48	
Small Enterprise Pipeline #	8	8	12	12	16	16	20	20	20	24	24	24	
Large Enterprise Pipeline #	4	4	4	4	4	4	8	8	8	12	12	12	
Total Pipeline #	28	28	40	40	52	52	68	68	68	84	84	84	
Mid-Market Pipeline $	$ 1,040,000	$ 1,040,000	$ 1,560,000	$ 1,560,000	$ 2,080,000	$ 2,080,000	$ 2,600,000	$ 2,600,000	$ 2,600,000	$ 3,120,000	$ 3,120,000	$ 3,120,000	
Small Enterprise Pipeline $	$ 960,000	$ 960,000	$ 1,440,000	$ 1,440,000	$ 1,920,000	$ 1,920,000	$ 2,400,000	$ 2,400,000	$ 2,400,000	$ 2,880,000	$ 2,880,000	$ 2,880,000	
Large Enterprise Pipeline $	$ 480,000	$ 480,000	$ 480,000	$ 480,000	$ 480,000	$ 480,000	$ 960,000	$ 960,000	$ 960,000	$ 1,440,000	$ 1,440,000	$ 1,440,000	
Total Pipeline $	$ 2,480,000	$ 2,480,000	$ 3,480,000	$ 3,480,000	$ 4,480,000	$ 4,480,000	$ 5,960,000	$ 5,960,000	$ 5,960,000	$ 7,440,000	$ 7,440,000	$ 7,440,000	
Mid-Market Leads	320	320	480	480	640	640	800	800	800	960	960	960	
Small Enterprise Leads	160	160	240	240	320	320	400	400	400	480	480	480	
Large Enterprise Leads	80	80	80	80	80	80	160	160	160	240	240	240	
Total Leads	560	560	800	800	1040	1040	1360	1360	1360	1680	1680	1680	13920

Note: The screenshot above is only a portion of Worksheet B. The actual excel spreadsheet is more substantial and it too is prefilled with example figures to help guide customization according to your organization's needs. If you haven't yet downloaded the worksheets, you can ***download all ten here.***

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WORKSHEET C: MONTHLY & WEEKLY PROGRESS MODEL

How to Use Worksheet C

A continuation of Worksheet B, this simple model breaks down the required monthly lead and opportunity goals into expected weekly progress metrics. We recommend high-level sales progress metrics be tracked monthly or quarterly, but that you also measure weekly momentum towards those goals. This includes how many new opportunities are created, how many dispositions (i.e. live qualifying conversations with prospects) are happening, and how many new leads are being generated for the sales team to qualify/disposition. You shouldn't allow long-term objectives to distract from achieving and monitoring important short-term account-engagement metrics.

Monthly New Opportunities	**Jan-18**	**Feb-18**	**Mar-18**	**Apr-18**	**May-18**	**Jun-18**	**Jul-18**	**Aug-18**	**Sep-18**	**Oct-18**	**Nov-18**	**Dec-18**
Mid-Market Pipeline #	16	16	24	24	32	32	40	40	40	48	48	48
Small Enterprise Pipeline #	8	8	12	12	16	16	20	20	20	24	24	24
Large Enterprise Pipeline #	4	4	4	4	4	4	8	8	8	12	12	12
Total Pipeline #	28	28	40	40	52	52	68	68	68	84	84	84
Approximate New Opportunities Weekly												
Mid-Market	4	4	6	6	8	8	10	10	10	12	12	12
Small Enterprise	2	2	3	3	4	4	5	5	5	6	6	6
Large Enterprise	1	1	1	1	1	1	2	2	2	3	3	3
Approximate New Dispostions Weekly												
Mid-Market	12	12	18	18	24	24	30	30	30	36	36	36
Small Enterprise	6	6	9	9	12	12	15	15	15	18	18	18
Large Enterprise	3	3	3	3	3	3	6	6	6	9	9	9
Approximate New Leads Weekly												
Mid-Market	80	80	120	120	160	160	200	200	200	240	240	240
Small Enterprise	40	40	60	60	80	80	100	100	100	120	120	120
Large Enterprise	20	20	20	20	20	20	40	40	40	60	60	60

Note: The screenshot above is only a portion of Worksheet C. The actual excel spreadsheet is more substantial and it too is prefilled with example figures to help guide customization according to your organization's needs. If you haven't yet downloaded the worksheets, you can ***download all ten here.***

SALES & MARKETING KICK-OFF AGENDA

With initial drafts of worksheets A, B and C completed (or at least with early ideas and figures sketched out), your next step is to communicate preliminary goals with your sales counterparts. Hosting a meeting between key sales and marketing managers to introduce and launch your account-based marketing program is pivotal. (*Note – depending on your organization's processes and roles, it may be difficult to fill out Worksheets A and B without substantial sales feedback; if this is the case, plan to complete these worksheets during and after the kick-off meeting*).

Remember that many sales organizations have been executing "Named Account" programs for years, but may not be used to their marketing counterparts following suit. Much useful information will come from sales' experiences; for example, sales' idea of what types of accounts should be targeted may vary substantially from what your marketing data suggests.

This meeting is your opportunity to get all parties on the same page with regard to objectives, definitions, who's doing what, and how you will both execute, measure and adjust tactics moving forward.

It's essential to absorb sales' input and communicate your own intentions to come to a consensus – ABM isn't effective if sales and marketing don't lock arms and work together. Consequently, you should expect to make adjustments to worksheets A and B during or after these meetings. (especially upon determining target accounts and buyer personas; see Section 3).

Meeting Objectives

- Discuss organization-wide goals (e.g., customer acquisition and retention, revenue, profit, etc.)
- Discuss specific sales goals
- Discuss specific leading indicator goals (e.g., opportunities, regular account engagement/penetration momentum metrics, etc.)

> ***"The organizations who are successful with account-based marketing (or account-based revenue) strategies focus less on the discrete functions, and more on strategic, company-wide relationship building with other target accounts."***
>
> **Kathy Macchi**
> Vice President, Consulting Services,
> *Inverta*

SALES & MARKETING KICK-OFF AGENDA (CONTINUED)

ABM Strategy Roles

- Discuss who owns what:
  - Executive sponsors
  - Sales and marketing program managers
  - Front-line staff (e.g., content creation, engagement tactics and measurement, lead scoring, etc.)

ABM Program Definitions

- Agree on definition of "Named/Targeted Account" (e.g., which type of firmographics are included? How specific should targeting parameters be?)
- Agree on specific set(s) of named accounts to pursue
- Agree on decision-makers, titles and/or roles to pursue (e.g., which personas within named accounts will you be targeting? Do these targeted personas differ between account types?)
- Agree on buying-stage definitions (e.g., marketing-qualified lead, sales-accepted lead, opportunity, etc.)
- Agree on when and how leads should be handed off from marketing to sales (e.g., lead scoring processes)

ABM Program Processes

- Discuss rhythm of working together
  - Quarterly business reviews
  - Monthly progress reviews
  - Weekly tactical reports/improvements
- Discuss specific roles for each group
  - Marketing
    - List development
    - Content creation
    - Engagement tactics
    - Nurturing tactics
    - Social- and trigger-event signals
    - Technology solution and integration needs
    - Program reporting and analysis
  - Sales
    - Lead follow-up
    - CRM-driven reporting
    - Qualitative feedback from the field
  - Customer Success
    - Social outreach and amplification
    - Customer testimonials, success stories, referrals
    - Customer relationships
    - Listen for buy signals, feedback loop from the field
    - Expedite feature requests for target account
    - Product briefings with best customers, potential customers
    - Create personalized experiences for target accounts
    - Voice of the customer, customer surveys

Reporting

- Develop specific reporting formats, cadences, and communication with stakeholders
- Define meeting rhythm for review, optimization

Note: Much of the items on this agenda will be completed in tandem with Step 3 of this workbook, "Identifying Target Audiences." In addition to completing Worksheets D and E, you'll likely want to leverage Worksheet F during such meetings.

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WORKSHEET D: ROLE ASSIGNMENT TABLE, ABM TEAM ROLES

How to Use Worksheet D

Use this spreadsheet as a starting point for very clearly assigning which departments (and ideally which specific individuals) will own various components of the program. Much of this can be completed during your initial sales-marketing kick-off meeting, but you'll likely need to continually update and adjust according to changing needs, new technology adoptions, new vertical opportunities, etc.

	Sales	Marketing	Support	Operations	IT
Strategy & Objectives					
Define ABM objectives					
Define monthly/weekly objectives					
Determine meeting/reporting cadence					
Target Audience Definition					
Establish named account target profile					
Develop target account personas					
Develop target account prospect list					
Content & Engagement Strategy					
Complete content map					
Define lead & opportunity stages					
Develop engagement offers					
Execution Detail					
Determine account/prospect deatils in CRM					
Develop tactical instructions for sales reps					
Develop training program for sales reps					

Note: The screen shot above is only a portion of Worksheet D, shown for the sake of visualization. If you haven't yet downloaded the worksheets, you can ***download all ten here.***

> *Orchestration is not a buzz word – it's table stakes. ABM requires that each function focus on how their activities support and interact with each other in service of the shared outcome. In some cases, teams must redefine how their function supports the ABM strategy. This could include introducing new tools to foster better collaboration, or assuming responsibility for different parts of the customer lifecycle – such as building loyalty and advocacy.*
>
> **Patrice Greene**
> President, *Inverta*

WORKSHEET E: ROLES & RESPONSIBILITIES CHECKLIST

How to Use Worksheet E

When implementing a cross-funtional ABM strategy, it's important to identify which teams will be responsible for what. Use Worksheet E to help instill an ABM mindset throughout the entire customer lifecycle. The following guidelines are recommendations for clear team ownership of roles and responsibilities.

Note: The screen shot above is only a portion of Worksheet E, shown for the sake of visualization. If you haven't yet downloaded the worksheets, you can ***download all ten here.***

Marketing	
	Document the company-wide ABM strategy.
	Schedule and lead cross-team meetings on a regular (bi-weekly, monthly) basis.
	Create a central repository and discussion of shared account knowledge. This goes beyond data collected in the CRM, and includes real-world planning discussions for go-to-market strategies by account.
	Jointly develop sales and marketing plays by account, document in the sales playbook.
	Create customer-focused content aligned with strategy.
	Develop, document and execute outbound campaigns to ABM accounts.
	Identify, measure and communicate key metrics - monthly, quarterly, annual.
Sales	
	Jointly develop sales and marketing plays by account. Execute sales plays.
	Execute social selling and relationship building with ABM accounts.
	Sales prospecting within ABM accounts.
	Share relevant content, social engagement with ABM accounts.
Customer Success	
	Encourage social outreach and amplification. (You may need to create internal rewards programs to incent the Success team to participate.)
	Personal invitations to customer education programs.
	Collect customer testimonials and case studies.
	Encourage customer referrals, broker conversations between accounts.
	Help close ICP deals - discuss how they've helped similar customers.
	Share educational content with accounts.
	Listen for buy signals, provide feedback to account management team.
	Develop authentic relationships with accounts, share knowledge with ABM task force team.
Support Team	
	Watch support tickets to monitor issues from key customers.
	Provide high touch, expedited service to best customers.
	Provide feedback on common issues to help product resolve before they become an issue.
Product Team	
	Create personalized UX experiences for target accounts.
	Interactions with best customers, customer interviews.
	Product roadmap briefings with best customers, potential customers.
	Invite best customers and potential customers to join customer advisory board.
	Voice of the customer information gathering.
	Conduct regular customer surveys, minimum annual frequency.

Step 3

Identifying Target Audiences

Before you can develop content and begin engaging individuals with your target accounts, you'll need to answer several specific questions:

- Who specifically are you selling to? (Remember: you may be targeting a number of named companies, but it's specific individuals within these organizations that buy your products, and you need to understand their motivations and purchasing triggers)
- What are their objectives, and obstacles to success?
- How specifically do they navigate stages of a typical buyer's journey?

The better you can answer these and related questions, the more precisely and successfully your sales and marketing teams will be able to resonate with and mobilize your target accounts.

Answers to these questions should come from both your sales team and marketing data acquired from your marketing automation systems, predictive analytics tools and website tracking tools (See "Step 6: Account-Based Marketing Software & Tools").

The following templates were created to help you crystallize and formalize both decision-maker descriptions and specific buying stages for your target accounts. We recommend that marketing teams own creation and completion of these documents, but that they be agreed upon and shared/leveraged jointly between sales and marketing. This will ensure that the content, stories and messaging in front of target accounts are consistent, crisp and accurate.

TARGET ACCOUNT & PERSONA CHARACTERISTICS

The following account-persona template is an example meant to guide you through your own target-account and persona creation efforts. It includes both firmographic and individual, role-based parameters to ensure your ABM content creation and engagement tactics won't be wasted on the wrong individuals within your targeted accounts.

Your own account-persona template should be customized to your organizational needs and may not include each of the following elements.

Account-Persona Template Example:

TIER ONE SUPPLIER

Profile Overview:
Tier one companies are direct suppliers to OEMs. Similar to the OEM structure, Tier one roles are organized into program teams around a particular part that goes into a particular make and model of a vehicle. These program teams are made up of a program manager (who oversees the entire manufacturing and assembly process), quality and mechanical engineers, and buyers.

Engineers are technical specialists who focus on the fit and functionality of the parts and ensure that quality certifications are in order. They work in the plant where the part is being manufactured.

Buyers are responsible for having the right parts in sufficient quantity to ensure the manufacturing process runs smoothly and is not delayed. Buyers work at the plant and can support many program teams. They report to Commodity Managers who award the business. They buy for an entire category and are responsible for budget, negotiating price on each part.

Profile Attributes

FIRMOGRAPHICS:

Titles:

- Program Manager: Oversees assembly of parts
  - Commodity Manager: Buys for category, negotiation and awards business, works out of corporate office
  - Buyers: Buy for a specific program, do the legwork for commodity manager, typically works out of the plant
  - Program Engineers: Fit and functionality of the parts to OEM's specifications
  - Supply Quality Engineer: Ensures certifications are in order
- Company size: 200+ employees
- Functional areas: purchasing, engineering

Geography:

- Typically close to OEM manufacturing facilities

Other Considerations:

- Work is awarded by program (particular make/ model of vehicle)
- Long sales cycles; typically 12-18 months to qualify the particular part and process

Responsibilities:

- Assemble and deliver parts in a timely manner; per fit and functional specifications as outlined by OEM
- Ensure quality certifications are in order
- Manage inventory of incoming parts from Tier 2 suppliers
- Negotiate pricing with Tier 2 suppliers to ensure part is delivered at agreed upon cost to OEM

Key Drivers:

- Cost and delivery
- Dependability and scalability
- Reputation for quality
- Service and engineering support

Pain Points:

- OEMs are always trying to reduce costs of materials and parts which squeezes suppliers' margins
- Meeting strict quality requirements of the OEM and government regulations
- Consistent quality and delivery of Tier 2 parts

Value Propositions:

- Reduce material costs
- Improve quality to meet OEM standards and government regulations
- Increase delivery consistency for improved predictability

> *Just because we're account-based in our marketing today doesn't mean that we get to stop having persona-based message or buying-cycle based message. It's our job to be as respectful to our buyers as we possibly can be. We need to pay attention to and honor their industry, their language, the challenges they face in their daily professional life, and where they are in their relationship to us as a vendor when we communicate with them. It creates complexity in marketing, but the more personalized as we can be to our buyers' needs in our content and message, the more successful we'll be in informing their buying journey.*
>
> **Jennifer Pockell Dimas**
> VP of Marketing,
> *Plex Systems*

WORKSHEET F: ACCOUNT & PERSONA DEVELOPMENT TABLE

How to Use Worksheet F

Worksheet F helps you complete the individual elements that will come together to form your completed account-persona template. Again, data required to complete this worksheet should come from a number of sources: market research, sales reps, marketing automation system reports, predictive analytics tools and ABM website tracking software (See "Step 6: Account-Based Marketing Software & Tools").

Start by defining your verticals (e.g., enterprise technology companies) and even naming specific accounts, then proceed to explain the drivers, pain points and your organization's unique value propositions by each role within those account types. Messaging by each role should be completed last.

Targeted Acct Types/Named Companies	**Targeted Personas**	**Responsibilities**	**Drivers** ***(what motivates decisions)***	**Pain Points** ***(challenges that keep these people up at night?)***	**Value Propositions** ***(what your company is bringing to the table***	**Key Messages** ***(how you're going to convey your value***
[e.g., Enterprise Medical Tech companies]						
Company 1	CEO					
Company 2	IT/CIO					
	CFO					
	CMO					
Targted Acct Types/Names	**Targeted Personas**	**Responsibilities**	**Drivers**	**Pain Points**	**Value Propositions**	**Key Messages**
[e.g., SMB Medical Tech Companies]						
	CEO					
	IT/CIO					
	CFO					
	CMO					

Note: The screenshot above is only a portion of Worksheet F. The actual excel spreadsheet is more substantial. If you haven't yet downloaded the worksheets, you can ***download all ten here.***

Step 4

Account Planning & Lead-Account Mapping

With ABM, we invert our thinking to focus on accounts rather than leads (though we must not forget the importance of personalized engagement with individuals on account buying committees). Traditional lead generation processes are geared toward a high quantity of leads regardless of the organization. With ABM, the focus is on opportunities created at target accounts, and support of the pipeline to close these accounts. Because the focus is on the account level, it's important to address lead-to-account mapping. Once a lead converts to an opportunity, it will be associated with an account and contact record inside of the CRM tool. Remember, the focus with ABM is gathering more data on more contacts at a specific organization, while simultaneously surrounding all buyers in the decision-making process.

Determine what accounts you will target based on your ICP, or ideal customer profile. You can use this information to target additional, similar accounts who have similar criteria and behaviors. Couple this with shared account knowledge from sales, marketing and post-sales teams to develop a cross-team account plan.

Many companies do a great job collecting data in the pre-sales process, only to lose the data in the conversion process when the lead converts to a contact record at the account level. Sales CRMs allow you to map custom fields between leads and accounts/contacts, and it's important to shore up this data loss for your ABM strategy. Be very clear between sales and marketing, to make determinations about what data will move to the account level vs the contact level. Remember, leads are individual name records. Once the lead is converted into an opportunity, it becomes a contact record, which is an individual record associated with an account. Accounts will have multiple contact records.

WORKSHEET G: ACCOUNT PLANNING & LEAD-TO-ACCOUNT-MAPPING

How to Use Worksheet G

To begin, have your CRM administrator provide a list of all lead data fields and account/contact data fields that need to be addressed. Review every data field and make a yes/no decision about whether the data should map from lead to account/contact level. Which data fields will move from lead to account or contact level, or are we choosing to 'lose' the data? If we agree the data field should be mapped, how will these data fields be mapped — to the account level or contact level? Map applicable data from lead to account inside of your CRM. It's OK to do this work manually until you define the process and determine what you need from a technology support standpoint.

Enter custom lead fields and show how they map to either account or contact level to retain data collected in the pre-sales process. Overwrite examples in this worksheet.

LEADS	OPPORTUNITY: ACCOUNT/CONTACT	
Lead Fields	**Account Fields**	**Contact Fields**
Referred By	Maps to Account Level	
Lead Source	Maps to Account Level	
Secondary Lead		Maps to Contact Level
Applications per Month	Maps to Account Level	
enter field name here		

Account Planning

	Company Size - Employee or Revenue	Potential Revenue Opportunity	# of Contacts in CRM	List Names and Relationships	Segment	# of Applications per Month *(insert applicable metrics for your industry)*
Account Name						
Account Name						
Account Name						
Account Name						
Account Name						

Qualitative Account Information

Best Practice: Discuss and document account information in a central location. This is above and beyond the data in the sales CRM, and includes personal relationships that can be utilized, customer referrals, etc.

- Customer Research
- ICP Definition - what are characteristics of our best customers which are shared with our best prospects?
- Industry Knowledge/Research - by account
- Cross-Functional Meetings - discuss, share and document account knowledge in a central, accessible location
- Action Items and Owners, by account
- Milestones, Due Dates
- Sales and Marketing plays - what we will do to win the account, planned touchpoints - owner and timing
- Determine and Document Pain Points - gather through research, feedback and persona development.
- Targeted Messaging - to specific accounts, speaking their language.
- Account centric vs person-centric - understand the buying process and the relationships between key decision makers, blockers and implementers.
- If current customers - cross-sell, retention and upsell support

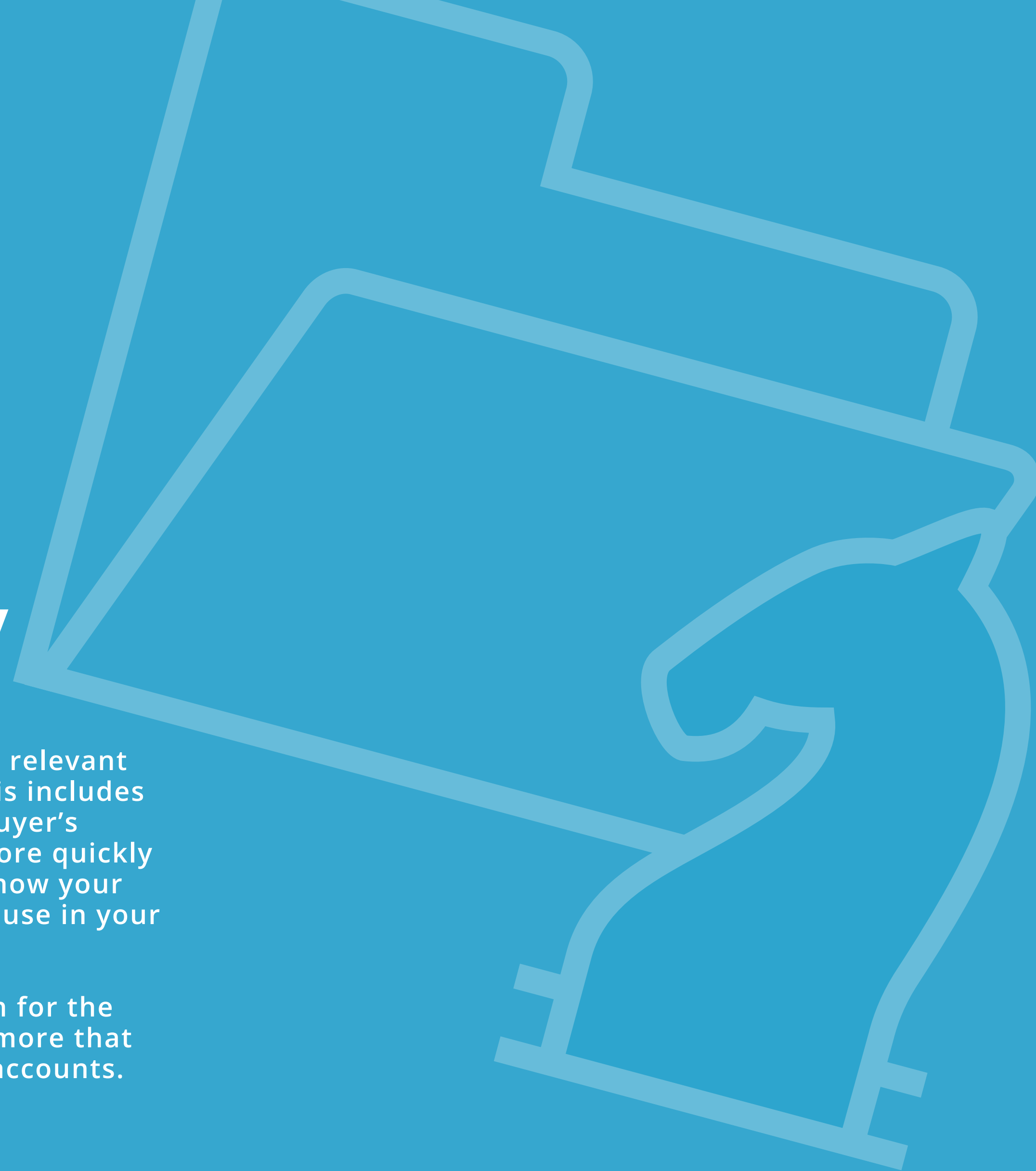
Note: The screen shot above is only a portion of Worksheet G, shown for the sake of visualization. If you haven't yet downloaded the worksheets, you can ***download all ten here.***

> *The key to operationalizing a successful ABM framework is tailoring your CRM and Marketing Automation Platform (MAP) for an ABM model. This involves setting up the target account tiers in the CRM, automating lead to account matching, building target segments back your MAP, having your content created, and then launching your campaigns. Think RAF: Ready your systems. Aim at the targets. Fire your content and campaigns.*

Dave Lewis
Founder & CEO, *DemandGen*

Step 5

Complete Content & Engagement Strategy



Once you've fleshed out the details of your target accounts and relevant personas, it's time to translate that into actionable content. This includes mapping the prospect's objectives and needs to stages of the buyer's journey, outlining offers and accelerators to move prospects more quickly from one stage to another, as well as a crisp understanding of how your content and offers map to the lead and opportunity stages you use in your CRM and within your marketing automation platform.

These worksheets, once completed, will serve as the foundation for the content, copy, editorial calendars, sales enablement tools and more that both sales and marketing will use to communicate with target accounts.

WORKSHEET H: CONTENT MAP BY BUYER'S JOURNEY STAGE

How to Use Worksheet H

This worksheet is used to develop and attach specific pieces of content to each stage of the buying cycle by each individual persona in identified account verticals. You'll find that many pieces of content work across several personas and account types. Having this spreadsheet created well in advance of scheduled distribution will ensure efficient use of resources. Further, keep in mind that repurposing material with slight adjustments (tailored to persona needs) is a key content marketing tactic and will save a great deal of time and effort.

Note the distribution tactics that will be used at each stage when deciding content asset type. For example, white papers and eBooks may be used for initial account-based lead gen efforts via third-party content syndication partners. While repurposed content from such white papers can be formed into nurture email templates or even IP-targeted banner ads.

Category	Persona	Stage 0 - Attention	Stage 0-1 Acceleration Offers	Stage 1 - Loosen the Status Quo	Stage 1-2 Acceleration Offers	Stage 2 - Commit to Change	Stage 2-3 Acceleration Offers	Stage 3 - Review Options
Vertical 1								
Vertical 2								
Vertical 3								

Note: The screenshot above is only a portion of Worksheet H. The actual excel spreadsheet is more substantial. If you haven't yet downloaded the worksheets, you can ***download all ten here.***

WORKSHEET I: CONTENT MAP BY LEAD-OPPORTUNITY STAGE

How to Use Worksheet I

Similar to Worksheet H, Worksheet I provides another method of assigning specific assets to various buying stages, based on interest level. In most cases, it's best to customize your own worksheet to your organization's specific buyer stages and prospect-phase definitions. Use both Worksheets H and I (as well as Worksheet F) to provide ideas and guide you through your own tailored content-assignment process.

Note: The screen shot above is only a portion of Worksheet I, shown for the sake of visualization. If you haven't yet downloaded the worksheets, you can ***download all ten here.***

	Stage	Definition	Content/Topics	Tools/Formats
Leads	***Open/Not Attempted***	New lead, has not been attempted or contacted by sales		
	Attempting to Contact	Sales has begun the process of following the lead follow-up process to reach the prospect live		
	Interested	Prospect has expressed interest in ABC Company and/or achieving better results, and is interested in learning more; full qualification criteria intent/purchase timeline still unknown		
	Nurture	Prospect is interested, but there is no near-term opportunity to buy (prospect may have other immediate priorities, or may just need more time to consider interest/intent)		
	Unresponsive	Haven't been able to get ahold of prospect after repeated attempts		
	No Further Action	Lead is not a qualified prospect		
Opportunities	***Qualified***	Prospect has a need & budget, and is actively evaluating solutions		
	Presentation & Demo	Demo has been scheduled or completed; working through objections & questions		
	Proposal	Formal proposal is in process or has been delivered outlining terms, services, fees		
	Negotiation	Prospect has verbally agreed to do business; both sides are working through final legal/term/service/fee details		
	Close	Agreement has been signed and returned		
	Closed Lost	Opportunity has stalled indefinitely or is dead		

MARKETING ENGAGEMENT TACTICS

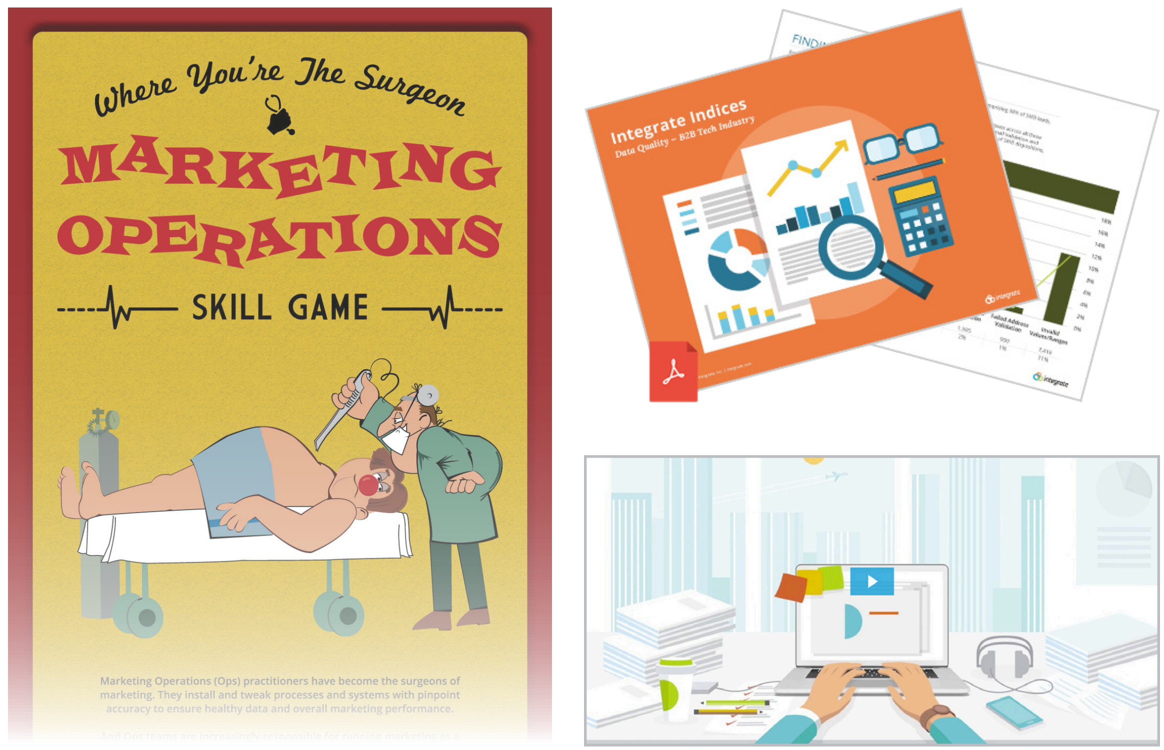
Introduction

Specifically *which* tactics make sense for your target accounts depends entirely on how well you understand the prospect's ecosystem, content consumption habits and preferences, as well as their internal and external influences.

The outline below is meant to serve as a representative inventory of content types and tactics to both spark inspiration as well as pull from and prioritize as you begin execution in the field. Most of these engagement tactics distribute content through the use of various ABM technologies, such as marketing automation systems, demand orchestration software, website personalization and IP-based ad-targeting tools (discussed further in Step 6). Automating content distribution via technology has several key benefits: greater efficiency, transparency, insights, control, scalability and predictability.

Content Types

- Blog posts
- White papers
- eBooks
- Infographics
- How-to guides
- Checklists
- Email templates
- Podcasts
- Videos
- Slideshare presentations
- Customer Q&As
- Display banners (for IP-targeting)



Sample content types.

Owned & Earned Media Tactics

- Website
  - Personalized content
  - Pop-up offers
  - Sidebar registration-required offers
  - Live chat
- Blog
- Social (customized to channels your targets use)
- Influencer media outlets
- Email – mostly used for nurturing named-account leads

Paid Media Tactics

- Third-party content marketing – to acquire individual leads and known ID info
- IP ad targeting and retargeting – to raise brand awareness throughout targeted accounts
- PPC (search and social)
- Telemarketing
- Appointment-setting (executed internally or via a third-party firm)
- Buying signal responses
  - LinkedIn Sales Navigator alerts
  - Signals from prospect database services such as RainKing
- Direct mail
  - Postcards
  - Second-day air packages

> *We must understand the ways in which our buyers discover a business problem and set out to solve it. We need to be where they are with content that answers any questions they may have at that moment. That means that not only should we understand who they are and what they may want to see on our website, but we must be thoughtful of buyers' wants anywhere they may consume our content at any point in their buying cycle. We need to know and acknowledge whatever we can about our prospects in order to provide the most value to our target accounts. Knowing the firmographic attributes that describe our targets is not enough.*

Jennifer Pockell Dimas
VP of Marketing, *Plex Systems*

DAILY/WEEKLY SUPPORT CHECKLIST

Introduction

After you acquire leads from targeted personas among your named accounts, you'll likely be injecting them into tailored marketing automation nurture tracks or handing off to inside sales to ensure the right messaging cadence based on Worksheets H and I.

The strongest ABM programs align closely with sales to ensure automated, personalized messaging is supported by structured sales team efforts. The following checklists outline the steps high-performing sales reps take to bolster marketing efforts on a daily and monthly basis.

Use and customize this checklist to direct the consistent, comprehensive execution from your sales representatives against their named account targets.

Daily

- ☑ Read news from your assigned Named Accounts (via Google Alerts, LinkedIn and other tools)
- ☑ Read and respond to individual trigger events and news from Named Account decision makers (from LinkedIn, Google Alerts, Newsle and other tools)
- ☑ Interact with social updates from your Named Account individuals (favorite/retweet their Twitter updates, favorite or respond to LinkedIn updates, etc.)
- ☑ Scan key "trades" for relevant articles
- ☑ Post interesting third-party articles into your LinkedIn updates, Twitter feeds

Weekly

- ☑ Look for new individuals or decision-makers within your Named Accounts; get introductions and engage where appropriate
- ☑ Identify and start following any industry-specific hashtags (including upcoming conferences) to both engage with Named Account targets and find new content to curate/share with them via your email and social channels
- ☑ Look at last week's meetings and presentations; add any new Named Account targets to LinkedIn; follow on Twitter; add them to your Twitter lists of Named Account targets to follow via HootSuite
- ☑ Sales conduct LinkedIn Navigator searches to identify personnel movement in and out of key accounts.
- ☑ Add and discuss any updates to the Account Planning documents, primarily managed by sales but contributed to by other departments.

Step 6

Account-Based Marketing Software & Tools

It’s possible to execute an ABM program manually, but with all the marketing technologies available today, that’s pretty much like bringing a knife to a gunfight.

Many marketers, however, aren’t aware of all the technologies available to initiate, manage and optimize a successful ABM program. While new technology capabilities are launched on nearly a monthly basis, the following list of tools are becoming foundational ABM technologies in 2017.

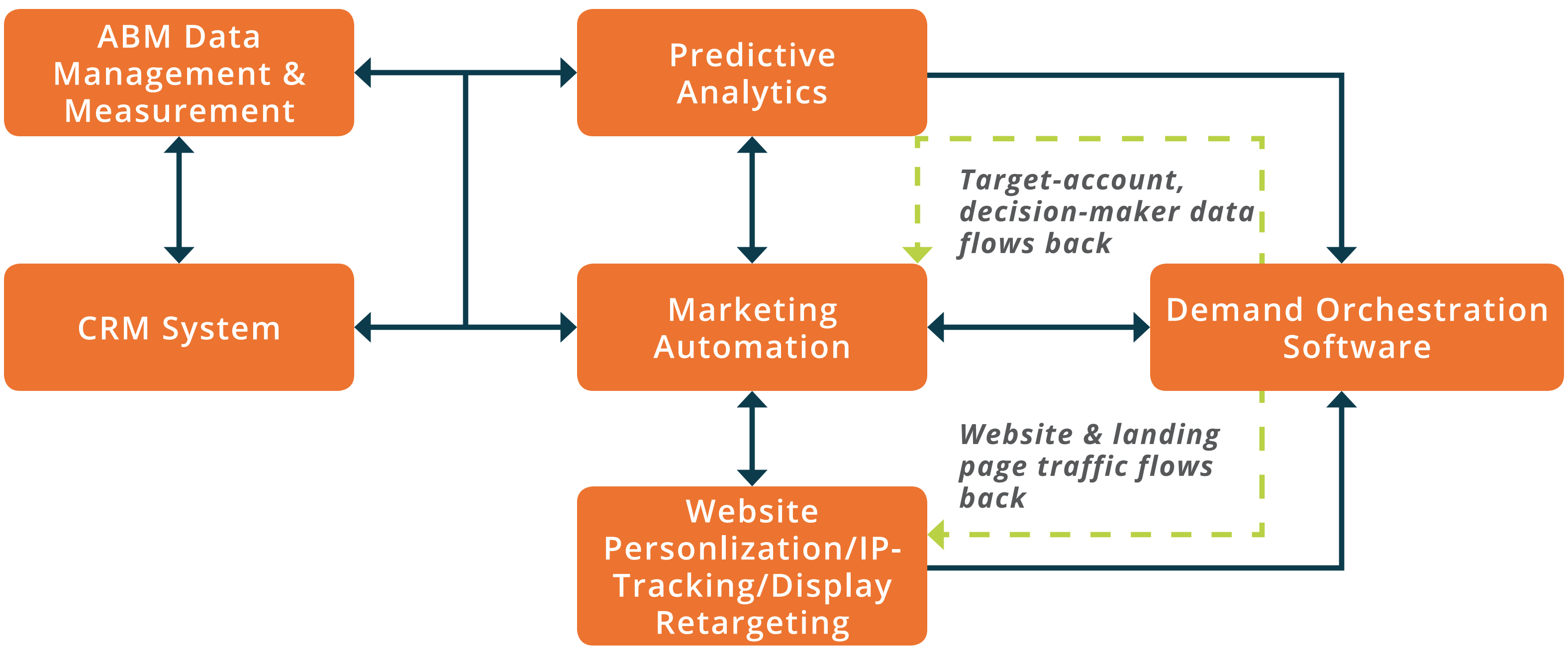
CRM & MARKETING AUTOMATION

Combined, these two platforms act as the two central hubs of your account-based marketing stack. They store all your customer and program data that drives the entire network of your marketing technologies and processes.

The CRM is the central hub of customer data, powering sales and supporting back-end performance reporting used by marketing to adjust its strategies, programs and tactics – namely via marketing automation systems integrations. Marketing automation systems leverage customer and prospect data (via CRM integrations) and marketing performance information to deliver messaging, control the cadence of communications through nurture tracks, score account/prospect readiness and report on ABM program marketing effectiveness.

Both CRM and marketing automation systems connect to a number of auxiliary technologies. And without these systems properly in place and integrated, none of the other ABM tools could properly do their job.

MarTech Systems



Integrations between systems can vary greatly based on organizational strategies and specific needs. This diagram outlines very common integrations between the ABM systems discussed.

PREDICTIVE ANALYTICS

Predictive analytics technologies take all available data from your existing database(s) (e.g., CRM, marketing automation, blogs, websites, landing pages, etc.) as well as external sources (e.g., government sites, social media channels) and use configurable algorithms to define:

- The firmographic and behavioral characteristics of your most valuable "closed-won" accounts
- The personas of individual decision-makers in those organizations
- The content that resonated with them

Predictive analytics essentially acts as your intelligence tool, providing you the information you need to devise ABM tactics. It enables you to score and segment your customer base on any attribute, such as company-growth indicators, social activity, technology usage, funding events, credit score, job data and more. With this knowledge, you can then create a realistic plan by pinpointing the types of accounts your organization is likely to successfully close.

ACCOUNT(IP-BASED) AD TARGETING

These technologies place your ads across leading exchanges and publishers, targeting only the IP addresses of companies on your account list. The great thing about this technology is that it prevents ad budget from being wasted on impressions or clicks with unwanted companies.

Most of these vendors allow you to select which ads are shown to targeted accounts across mobile, display, social and video. IP-based targeting thus ensures all decision-makers at an account see your content, not just the ones you happen to have information on.

DEMAND ORCHESTRATION SOFTWARE

Complementing account-targeting ad technology, demand orchestration software enables you to engage the individual decision-makers at targeted companies with your branded content.

IP-targeted ads are important for brand awareness and ensuring breadth of engagement across the targeted account. But unless the decision-makers at these accounts make the move to visit your website, you won't gain any known ID information (prospect data such as email, job title, etc.) required for further account nurturing.

Demand orchestration software helps you get this known ID prospect data without relying on decision-makers to come to you – instead, your content goes to where they're having relevant conversations, where you can then acquire their info and inject it into your marketing automation nurture tracks and CRM system. To learn more about demand orchestration software, read this guide.

ACCOUNT DATA MANAGEMENT & MEASUREMENT

This technology pulls together all the various data acquired during your ABM programs to form a holistic picture. It does this by associating leads to accounts and passing account details to your unconverted prospects. It then segments account details like owner, active opportunity, customer, products purchased, sales stage, target account or strategic account, etc.

Creating this big picture of all ABM programs, ABM data management and measurement software ensures the usability of all the data you collect. Moreover, it helps align marketing and sales efforts by providing sales reps with the data they need to assist prospects further down the purchase cycle.

WHAT NOT TO FORGET

Tech won't do everything. Setting appropriate goals, KPIs and benchmarks is paramount, as is understanding individual personas and developing content that resonates with them. Perhaps most importantly, successful ABM strategies depend on proper integration between sales and marketing. Without such integrated processes, data and goals, marketing teams can't get the info they need to adequately identify and engage targeted-accounts, and the buyer's journey will suffer from a disjointed transition of accounts from marketing to sales reps.

WORKSHEET J: ABM TECHNOLOGY TOOLS & VENDORS CHECKLIST

How to Use Worksheet J

Worksheet J lists the key ABM tech categories as they stand today, outlines their main values as discussed above, and highlights the primary vendors in each category. The final column "Adoption Schedule" is meant to guide your 2017/2018 marketing tech road map. The best technology roll-outs result from a well-planned schedule that ensures smooth system integrations, comprehensive user training and practice, and adequate ramp-up time.

It's also a good idea to create a marketing tech blueprint in advance of any technology adoption. This allows you to visualize your growing technology stack and prioritize investments and integrations, and also provides a helpful tool for getting necessary buy-in from all stakeholders.

Technology Category	Value	Key Vendors	Adoption Schedule
CRM	Central hub of customer data. Powers sales and much of marketing.	Salesforce; Sugar CRM; Microsoft Dynamics; Netsuite	Current system
Marketing Automation	Central hub of marketing data. Steers the coars of marketing efforts and is primary platform with which most marketign techs are integrated.	Marketo; Oracle Marketing Cloud; Infusionsoft; Pardot; Hubspot	Current system
Predictive Analytics	Acts as your intelligence tool, providing the data you need to devise ABM tactics. It enables you to score and segment your customer base on any attribute and pinpoint the types of accounts your organization is likely to successfully close.	Lattice Engines; Mintigo; 6Sense; Leadspace; Infer; Radius; SalesPredict; Everstring	Jan-18
IP-Based Ad Targeting	Places your ads across leading exchanges and publishers, targeting only the IP addresses of companies on your account list. Prevents ad budget from being wasted on impressions or clicks with unwanted companies.	Demandbase; Terminus; Vendemore	Mar-18
Demand Orchestration Software	Enables you to engage the individual decision-makers at targeted companies with your thought leadership and other longer-form content. Helps you get this known ID prospect data without relying on decision-makers to come to you.	Integrate	Mar-18
Website Personalization	Tracks the sources and actions of targeted account personas when they come to your website and provides personalized experiences according to the visitor's intent and characteristics.	Evergage; Triblio; Get Smart Content	Jun-18
Account-Data Management & Measurement	Pulls together all data acquired from ABM programs to form a holistic picture. Associates leads to accounts and passes account details to your unconverted prospects.	LeanData; Engagio	Aug-18

Note: The screen shot above is only a portion of Worksheet J, shown for the sake of visualization. If you haven't yet downloaded the worksheets, you can ***download all ten here.***

WORKSHEET K: ABM VENDOR VETTING CHECKLIST/SCORECARD

How to Use Worksheet K

While there never seems to be enough time to perform an adequate marketing tech vetting process these days, any time spent qualifying the best solutions and vendors will save your team time, effort and budget down the road.

Worksheet K lists six information sources that you can and should consult during each vendor evaluation process. You'll want to combine various information sources in a way that provides you with a well-rounded view to make educated decisions and wise tech investments.

Use the checklist as both a guide and as a scorecard, inserting notes beside each vendor and under each information source. Worksheet K provides a couple examples to help you get started.

Technology Category	Vendor Name	Consultancy/Analyst Reports	MarTech Influencers	Peer Advice/Insights	Current MarTech Partner Advice	Vendor Website / Content	Vendor Product Demo
Predictive Analytics	[e.g., 6Sense]	[e.g., Ranked high for predictive data analysis by Forrester among predictive vendors in July, 2015 report]		[e.g., Highly recommended by Cisco VP of Marketing]		[e.g., Understand the tech landscape and our pain points]	
IP-Based Ad Targeting	[e.g., Demandbase]		[e.g., Frequently mentioned as the leader in this space]		[e.g., Many integrations with current partners and road-mapped data partners/ tech vendors]		
Demand Orchestration Software	[e.g., Integrate]						
Webiste Personalization	[e.g., Triblio]						
ABM Data Management & Measurement	[e.g., LeanData]						

Note: The screen shot above is only a portion of Worksheet K, shown for the sake of visualization. If you haven't yet downloaded the worksheets, you can ***download all ten here.***

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INTEGRATE

Master demand marketing.

Integrate is a marketing technology provider of Demand Orchestration Software, enabling marketers to automate top-of-funnel demand marketing efforts. The software works with marketing automation and CRM systems, as well as ABM and predictive software, to build holistic, predictable demand marketing engines. The end results are more efficient marketing organizations; cleaner, faster prospect data; and scalable contributions to pipeline and revenue. Visit www.integrate.com or follow @integrate to learn why innovative companies like Dell, Rackspace, Salesforce and Intacct choose Integrate.

For more information, contact us at: 866-478-0326 | requests@integrate.com

HEINZ MARKETING

Established in 2008, Heinz Marketing, Inc., is a B2B sales and marketing firm located in Redmond, WA. With 8 employees, the firm serves businesses throughout North America and overseas. Heinz Marketing focuses on driving results through strategic demand generation, disciplined sales funnel strategies, fully-integrated campaigns and collaboration between marketing and sales organizations.

For more information, contact us at: 877-291-0006 | acceleration@heinzmarketing.com

B2B Marketing Academy

The B2B Marketing Academy's mission is to help marketers advance their craft of B2B marketing. Leading CMOs and marketing executives choose to work with the B2B Marketing Academy through frameworks and consulting engagements to provide coaching and leadership for their marketing teams. Go to www.b2bmarketingacademy.com or follow @PegMiller to see how the B2B Marketing Academy helps modern B2B marketers drive results through content operations inventory and planning guides, go-to-market planning templates, and martech decision tools. Services include strategic consulting; marketing strategy and execution; full funnel development, lead generation, and optimization; content marketing coaching and execution; product marketing and post-sale customer marketing.

For more information, contact us at: peg@b2bmarketingacademy.com