ACCOUNT-BASED MARKETING

# The Actionable Guide to Account-Based Sales Activation

How to increase SDR responses, deal velocity, pipeline and retention


terminus

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# The real threat to your business is internal.

In the midst of the growing level of data sources and external competition, one of the greatest threats to your success is internal. Mistrust, miscommunication, and misinformation between sales, marketing, and customer success can cause frustration, turnover, lost deals, and missed growth opportunities. Marketing doesn't trust that sales reps are reaching out to the right accounts, while Sales feels overwhelmed by a never-ending list of what seem like low quality leads.

 

## Good activation practices are the key to aligning sales and marketing toward the same revenue goal. To do great activation, you need to overcome the B2B data challenge. Tools like Terminus help with that.

Even though you're on the same team, competing KPIs, information silos, and different approaches can cripple an otherwise strong business with a great product.

The winners will be businesses that excel at Sales Activation - working hand-in-hand with the in-market teams to build trust in ABM, align on the right accounts and KPIs, and focus every ounce of effort on the highest-ROI activities. If you're a marketer, sales, or customer success leader interested in succeeding with ABM, keep reading.

The two challenges to creating effective sales activation are bad tech/process and bad alignment. These can both be solved with account-based marketing and the T.E.A.M. approach.

### The Cost of Misalignment

**43%** of B2B marketing decision-makers report that their companies have **lost sales** as a consequence of not having necessary content at the right time for a specific customer (Forrester Q1 2017 International B2B Marketing Panel)

**77%** of the rest have experienced **costly delays**. (Forrester Q1 2017 International B2B Marketing Panel)

**41%** of online ads reach the wrong audience. (Nielsen)

**70%** of content goes unread. (SiriusDecisions)

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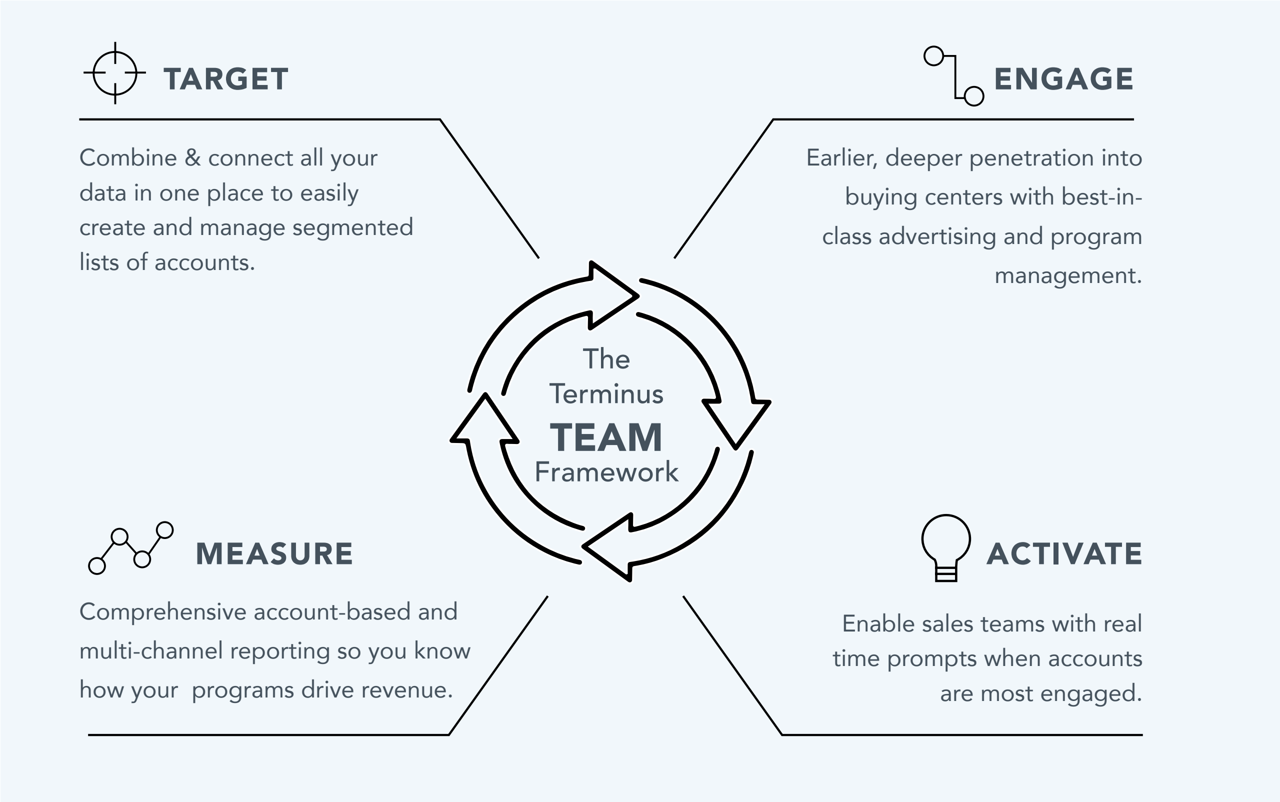
# The A in TEAM is for Activate.

Terminus' T.E.A.M. framework is our approach to account-based marketing and marketing-sales alignment. And a critical step is sales and customer success Activation — delivering the right message and context to market-facing teams so they are able to stay in front of their high-propensity target accounts with hyper-relevant messaging.

Only by Activating your sales and CSM teams with the right data at the right time with the right message can you overcome the hypercompetitive landscape and not drown in the data tsunami.

To achieve this, you'll need to reassess how you align marketing and sales, ensure the proper tools are in place, and develop plays to work together fast. Marketing and sales leadership have a shared responsibility to work hand in hand to bring this to life, as marketing joins sales and CSM teams further into the customer lifecycle.

In this eBook, we'll explore the tools and techniques used by highly effective sales and marketing teams.

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PART 1

# Laying the Foundation for Success with Marketing & Sales Alignment

# Better Alignment = Better Results

If we zoom out, all employees have the same goal: ensure the financial health of the business (and themselves). It's when we zoom in that particular roles, responsibilities, and ways of working can put teams at odds. Marketing thinks that Sales isn't reaching out to the right accounts, while Sales teams are overwhelmed by volume and questions about lead quality. They're your colleagues, not your competitors.

**2 keys to winning in the new sales paradigm:**

- Achieving true synchronization between sales and marketing (same accounts, same message, coordinated timing) by building on the same account lists & intelligence
- Getting better data and operationalizing it faster than your competition

Sirius Decisions found that B2B organizations with collaborative marketing and sales teams achieved **24% faster revenue growth** over three years compared to their less-aligned counterparts.

LinkedIn found that **54% of sales and marketing professionals** agree alignment boosts financial performance while **58% agree** it delivers improved customer retention.

  

# Your Mission, Should You Choose to Accept It

Before we dive into the data tools and approaches that will support this alignment, here are some foundational communication and collaboration objectives to start breaking down the organizational silos between marketing and sales.

**The first step is to set your teams up for success with these three simple steps:**

1) Create target account lists ~together~

2) Establish communication methods and common KPIs

3) Create a positive and consistent feedback loop

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# Create target account lists ~together~

Collaborate on creating target account lists. While marketing should drive the data approach and initial selection of target accounts, sales needs to be excited and empowered to work the accounts. A data-driven approach using cross-channel data, which we'll discuss later, can help, but the activity must be collaborative to ensure buy-in across the org. No one wants to be sent a giant to-do list they had no hand in developing.

To ensure you're not just pushing the misalignment problem down the funnel, your lists should get buy-in from all related teams: demand gen (marketing), sales development leadership, account executives, and for expansion plays, include success teams.

> LinkedIn's research shows that businesses with strong sales and marketing alignment are 67% more effective at closing deals, 58% more effective at retaining customers, and drive 208% more revenue as a result of their marketing efforts.

LinkedIn

### Helpful Resources

- [Webinar] How to build your first target account list
- [Blog] How to get sales onboard with ABM

 

# 5 Steps to Creating Account Lists that Excite Everyone

**1. BRAINSTORM**

Hold a brainstorming session to determine the right criteria for the quarter. Include influential representatives from each revenue team, and be sure you're armed with data on the similar account attributes of companies that closed fastest for highest ACVs.

**2. PRESENT PROFILES**

Follow-up to present the final profiles, address any lingering concerns, and check-in that your TAM sizing represents a large enough opportunity to get the revenue you want.

**3. DISTRIBUTE FIRST DRAFT**

Give AEs a chance to weigh in on accounts they've worked before and assess whether there is any new likelihood now that they'll close. Let people ask why specific accounts got in. If you use Slack, set up a #listbuilding slack channel for transparency on how the decisions get made.

**4. UPDATE**

Make updates, adding and removing names. Marketing has to make sure that the final companies meet the profile, and that the list size is big enough to meet your revenue goals.

**5. GET TO WORK**

Put it in your CRM and get to work!

**IMPORTANT:** Make sure you time the process so the list is in the hands of sales on day 1 of the quarter.

Want to deep dive into targeting? Read The Complete Guide to Account Targeting.

  

# Establish communication methods & common KPIs

Establish ongoing communication tools and forums to support collaboration on common KPIs. Typical shared KPIs include **revenue potential in the pipeline, opportunities created, and account engagement spikes.** If sales and marketing are truly aligned and working accounts in tandem, these KPIs become shared and should be what both teams rally behind. Marketing will have to say goodbye to their MQL targets and instead focus on more meaningful interactions and opportunities influenced by their campaigns. Sales will need to support marketing with insights to help produce more targeted messaging to boost campaign performance.

Once the KPIs are determined, set up recurring meetings between department heads to sync on strategy, and cross-team sessions to share success stories and challenges. At a 1x1 level, encourage teams to chat in person, use Slack or another communication tool to keep conversations managed, and host a Sales and Marketing mixer to humanize the teams.

Sales reps and marketing teams need to know they can collaborate and count on each other, and that comes from real experiences with real people. They should also be ready with insights, in the form of reports and anecdotal evidence, to share with their teammates.

**LinkedIn found that**

**52%**

of sales and marketing professionals agree shared objectives and KPIs improve collaboration.

**Examples of other shared KPIs:**

- Cold outreach response rates
- Pipeline velocity
- Demos scheduled

  

# Create a positive, consistent feedback loop with regular meetings

## Sample Sales & Marketing Weekly Meeting Agenda

- ☐ **2 MINUTE TEAM BUILDING EXERCISE**
  - E.g. Fun facts, weekend happenings, meme of the day, funny customer stories, etc.
- ☐ **REVIEW OF COMMON KPIS**
- ☐ **MARKETING PRESENTS**
  - Results from Recent Marketing Campaigns
  - Top Performing Campaigns
  - Worst Performing Campaigns
  - Upcoming Marketing Assets & Deliverables
- ☐ **SALES PRESENTS**
  - Results Scorecard
  - Opportunities Closed and Lost
  - Feedback on Marketing Approach

## Recommended Meeting Cadence

- ☐ **EVERY WEEK**
  SDRs and Demand Gen
- ☐ **EVERY OTHER WEEK**
  - Director of Demand Gen and AE Managers
  - Director of Demand Gen and SDR Managers
- ☐ **MONTHLY**
  All sales leadership from CRO to managers and marketing leaders.

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# Sample Sales and Marketing Leadership Monthly Meeting Agenda

**5 minute reiteration of primary company mission statement, company OKRs, and biggest wins.**

## MARKETING REVIEWS:

### Priority Account Planning

- [ ] Marketing reviews new high-priority accounts showing behavioral signals to ensure alignment on an engagement and activation plan with sales input. This can be done using a custom SFDC view of aggregate data provided by tools like Terminus.

## SHARED KPIs REVIEW

- [ ] Check in on volume of first calls, opportunities, and velocity metrics to identify if your list needs to grow/ shrink, or if you need to focus on a different funnel stage.

## SALES PRESENTS:

### Account Response Management

- [ ] Sales leaders can present on the response rates, pipeline velocity, and temperature of each account so marketing knows the results of their shared efforts beyond site traffic and CTR.
- [ ] Sales surfaces any new accounts showing signs of engagement not tracked by marketing.
- [ ] Sales identifies successful marketing content and provides feedback on engagement campaigns.

  

# 3. Know what to expect from your teammates

Align on the best ways of working. While teams should collaborate, marketing and sales have separate charges and functions and should align on best practices and ways of working — and these should be clarified early and often.

**Marketing: How are you helping sales?**

Marketing is responsible for gathering the data intelligence, running campaigns to support key moments in the funnel, and delivering the data regularly.

Today's B2B marketer should be accountable to revenue, measuring success in dollars, not qualified leads or fuzzy awareness metrics. To achieve this, marketers need to be involved deeper in the funnel.

**Sales: How are you helping marketing?**

Sales is responsible for acting on that data and treating every touch as sacred. Every touch within an account represents an opportunity for sales to learn more about the business and relay that information to marketing to refine their campaigns.

When sales has practiced good discovery and aligned their messaging with marketing's improved campaigns, they can build more meaningful relationships which will reinforce renewals downstream.

**Say "No"**

Say no to the 'hand-off' and yes to hand-in-hand collaboration — from account selection to close to customer development.

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PART 2

# Be The Brand You Wish To See In the World (with Sales' Help)

# Be the brand you wish to see in the world

## Right Data, Right Time, Right Channel

> Imagine a world….where you're able to know who truly needs your product before they know they need it. A world where you can reach out with the solution to a problem someone is trying to solve — right when they are trying to solve it. With the right data at the right time, sales can craft hyper-contextual outreach to the right people when they need you most.

The impact of this is a positive brand experience for your target customer, alleviating the annoyance of a sales person reaching out at the wrong time. That differentiation sets your company apart, leading to better sales outreach response rates, more product demos, a faster pipeline, and higher win rates.

You get promoted and retire to a beach.👋 What a world.

When marketing arms sales with the right info at the right time, they help sales do their job better and develop a more efficient engine across the entire lifecycle. Experts know that the first rep often wins, so actioning off data quickly and via personalization can help a rep frame the decision making process to put their business in first place.

The following section will educate you on how to best activate your sales team through account-based data.

 

# 5 Steps to Activating on Account Intelligence

| STEP 1 | STEP 2 | STEP 3 | STEP 4 | STEP 5 |
|---|---|---|---|---|
| Consolidate account intelligence and audiences into a single central database | Monitor engagement by topic area and over time | Make data accessible to sales where they are | Prioritize & Personalize | Create a content journey map |

What is Account Intelligence? Account Intelligence refers to behavioral signals, in-market intent, firmographics, technographics, relationship data — anything you can get your hands on! Marketers then need to use this aggregate view of what's happening with accounts to help individual reps focus in on what is most relevant and most actionable to cut through the noise to find the signals that matter.

To support your marketing and sales teams working together, you need to acquire and operationalize foundational account-based, comprehensive data sources. In order to properly PRIORITIZE & PERSONALIZE your sales activation efforts (phew, thank goodness they both start with Ps), you need consolidated account intelligence. If you're using separate data, how can you expect teams to work together?

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# Account Intelligence Sources

The key account intelligence sources at a business' disposal include:

**Web Engagement** *(not just raw clicks, but changes over historical trends)*
Web engagement includes both known and anonymous visitors to your site from every account.

**Intent Data** *(who is searching for your product, or worse, your competitors)*
Intent data includes third party data that uses competitive site visitation and search queries to determine when a customer is in-market for a service

**Relationship Score Data** *(the heat signature of your relationship status)*
Relationship data is the means of identifying and quantifying the entire network of relationships that your employees (including the C-suite) have within an account through the use of email engagement and language processing data. As the account progresses through the sales journey, their engagement should subside while the relationship score increases demonstrating active discussions.

**Technographic Data** *(in short, the tech stack)*
Technographic data are insights into the technology an organization or its employees use.

**Firmographic Data** *(are they a match?)*
Firmographics are the attributes account-based marketers (and B2B companies in general) use to segment their target market in order to discover their ideal consumers. Common attributes include industry, revenue, company size, location, etc.

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# Consolidate account intelligence and audiences into a single view

To act on data, it needs to be consolidated into a single place to mine for insights. With accurate, refreshed data at your fingertips (that might have taken days or a week to consolidate before) you can end data dumps between marketing and sales and extract real insights.

*Insights are data-driven findings that help progress the sales journey. It's a piece of information — maybe news, maybe an AI-powered trend — that sales can use to take contextual, meaningful action that has a higher likelihood of getting a positive response.*

At scale, Terminus consolidates these essential account-based data sources into a single hub for easy management and quick transfer to sales for action. It also enables marketing to build account audiences off of those critical data points in conjunction with CRM data. Remember that taking action quickly so you're the first is what's really critical.

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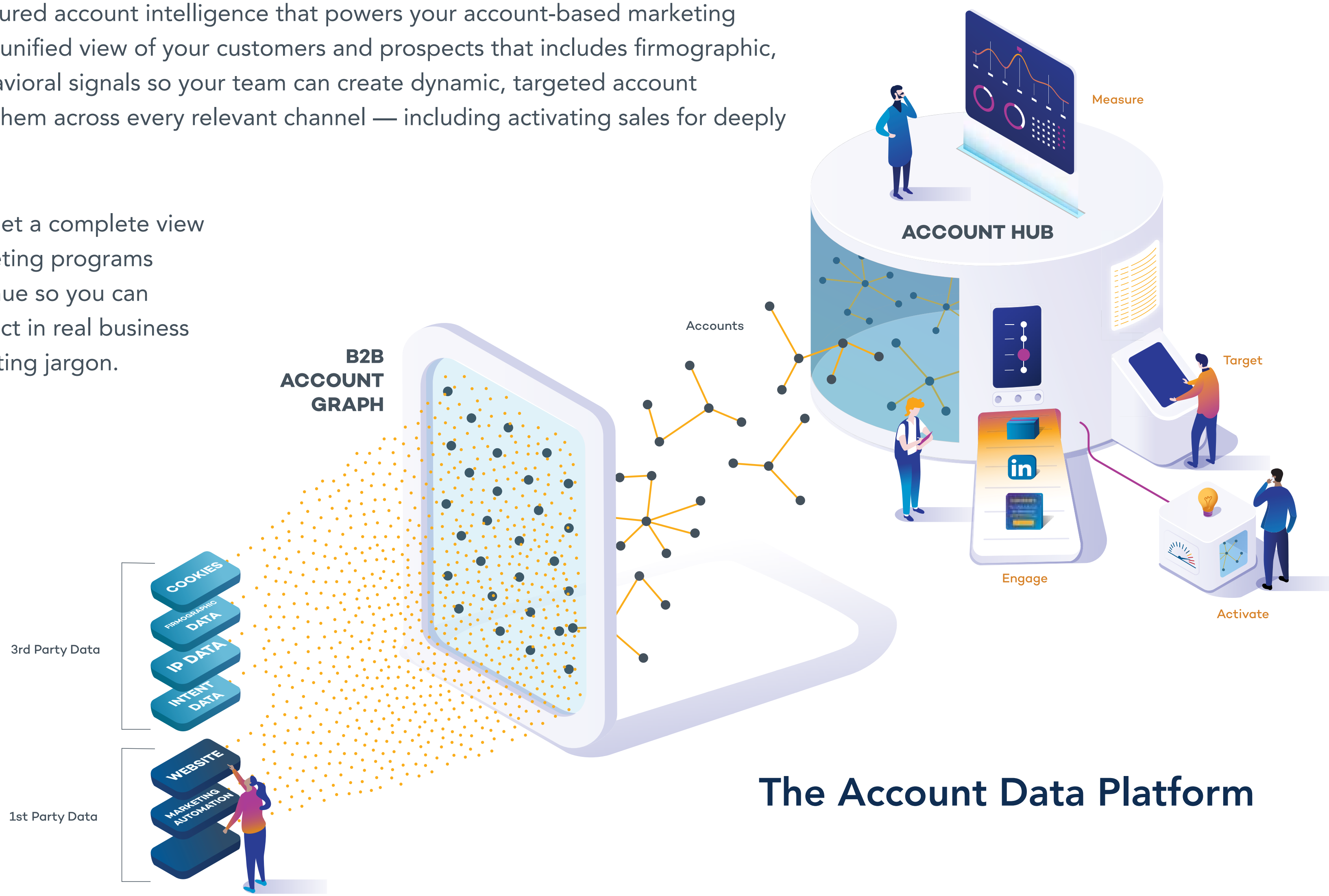
# The Terminus Account Hub

Terminus aggregates your first and third-party account, contact and behavioral data and synthesizes it into structured account intelligence that powers your account-based marketing programs. Finally, get a unified view of your customers and prospects that includes firmographic, technographic and behavioral signals so your team can create dynamic, targeted account audiences and engage them across every relevant channel — including activating sales for deeply personalized outreach!

And, in the same tool, get a complete view of how all of your marketing programs drive pipeline and revenue so you can communicate your impact in real business terms, instead of marketing jargon.




## The Account Data Platform

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PART 3

# Real Customers, Real Results

# Monitor web engagement by subjects and over time

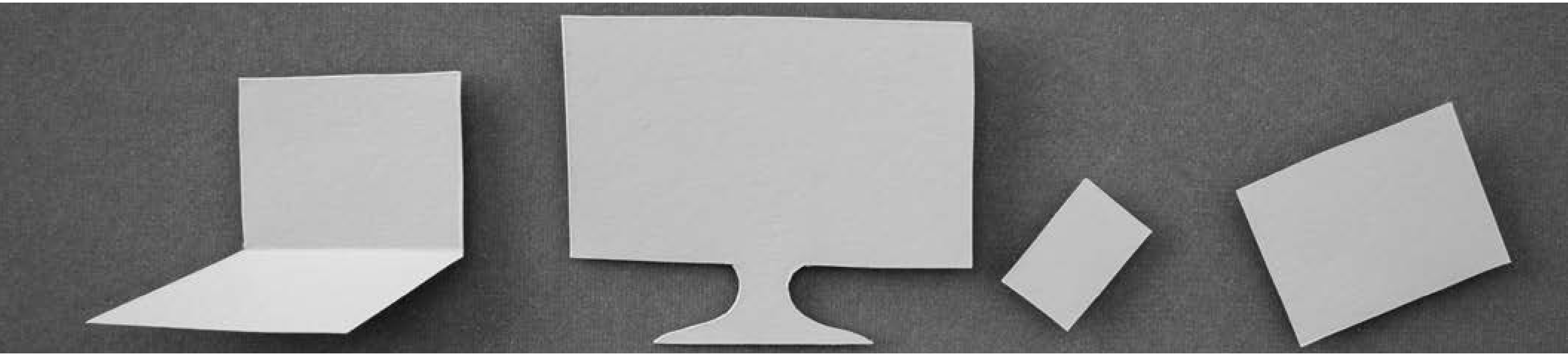
To make web engagement actionable, you have to go deeper into what pages are being visited and how frequently related to the account's history. In order to do this, you'll need 3 things (or one thing from Terminus):

a. A reverse IP lookup tool on your website to show you anonymous and known traffic from each account. This will help you keep track of a potential decision maker who might be researching your site but refuses to fill out a form.

b. A system in place to bring that web engagement to the right account record in your CRM. This will usually involve your marketing ops team member or your CRM admin.

c. An AI-powered alert system which tells you when an account is unusually active beyond traditional scoring models which weight enterprise behavior more heavily due to its size.

Terminus helps you see this with our custom engagement models & spike reports, easy to set up reports that help you understand when an account is heating up and your sales team should be activated.



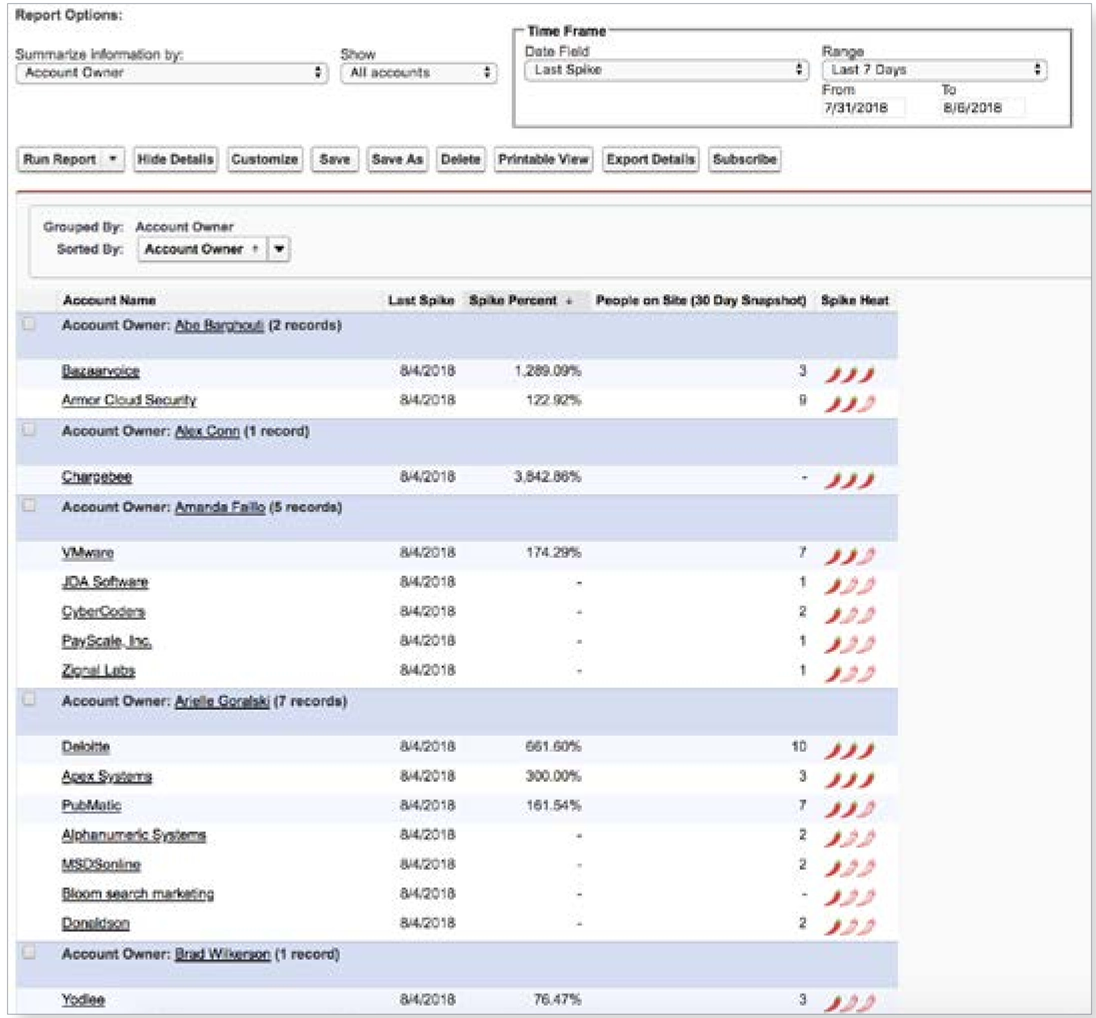
# Engagement Insights Delivered Directly To Your CRM

## Pages Matter

By categorizing your website's pages into upper funnel awareness pages and deeper product consideration pages, you can better understand the intent of your site visitors (early, exploratory research OR specific interest in a specific product)

## Over Time

Only by looking at these models over time can you truly extract the full insights from the data. Terminus creates a historical 30-day index to trigger alerts when an account is spiking more than their historical average.




| Account Name | Last Spike | Spike Percent | People on Site (30 Day Snapshot) | Spike Heat |
|---|---|---|---|---|
| Account Owner: Abe Barghouti (2 records) | | | | |
| Bazaarvoice | 8/4/2018 | 1,289.09% | 3 | |
| Armor Cloud Security | 8/4/2018 | 122.92% | 9 | |
| Account Owner: Alex Conn (1 record) | | | | |
| Chargebee | 8/4/2018 | 3,842.86% | - | |
| Account Owner: Amanda Fallo (5 records) | | | | |
| VMware | 8/4/2018 | 174.29% | 7 | |
| JDA Software | 8/4/2018 | - | 1 | |
| CyberCoders | 8/4/2018 | - | 2 | |
| PayScale, Inc. | 8/4/2018 | - | 1 | |
| Zignal Labs | 8/4/2018 | - | 1 | |
| Account Owner: Arielle Goralski (7 records) | | | | |
| Deloitte | 8/4/2018 | 661.60% | 10 | |
| Apex Systems | 8/4/2018 | 300.00% | 3 | |
| PubMatic | 8/4/2018 | 161.54% | 7 | |
| Alphanumeric Systems | 8/4/2018 | - | 2 | |
| MSDSonline | 8/4/2018 | - | 2 | |
| Bloom search marketing | 8/4/2018 | - | - | |
| Donaldson | 8/4/2018 | - | 2 | |
| Account Owner: Brad Wilkerson (1 record) | | | | |
| Yodlee | 8/4/2018 | 76.47% | 3 | |

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# Prioritize & Personalize


With these account-based data sources, and a marketing team and sales team set up for success, you can achieve the holy grail of sales activation: prioritized and personalized sales activation.

When marketing can help sales prioritize their outreach, sales can invest energy in more deeply personalized touches. Instead of cold calling a list of disparate accounts, sales can dive deep on specific accounts and really research the entire buying center, engaging them with custom 1-to-1 touches, sales-led direct mail, or messaging that is aligned with marketing campaigns.

Personalization goes beyond adding a first name and a shared interest in an email. It's demonstrating such an in-depth knowledge of a company's goals, culture, and problems that you become a consultant who is impossible to ignore.

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# Good vs Bad Personalizations

**SETTING**: Tim, a salesperson from a call tracking company, receives an alert that a national yoga studio chain, one of their target accounts, has become heavily engaged with the Vanity phone number page of his website.

### GOOD PERSONALIZATION: RIGHT MESSAGE, RIGHT PERSON, RIGHT TIME

Tim quickly does an audit of their website to assess the tone and character of the company, which targets a college-aged demographic with a playful, edgier tone. He does a quick audit of available vanity numbers and sends the following email to Megan, who is their marketing manager according to LinkedIn:

> *"Hey Megan, a few Vanity numbers have recently become available that made me think of you and your studios and I wanted to hold them for you in case you were on the market for a new Vanity number, which are proven to increase call traffic from print ads by up to 25%. Please let me know if your free for a quick chat about provisioning these before they get snagged by a different company. 1-800-VINYAYA / 1-800-NO-POSER / 1-800-GETBENT. I think these would really resonate with the college students in your target markets. If these examples are too much of a stretch, we have a lot of other options available (1-800-NAMASTE) and I'd be happy to work with you to find the perfect fit. Hope to hear from you soon — namaste!"*

Meanwhile, marketing spins up some new display creative on the benefits of custom vanity numbers for fitness organizations to follow up on Tim's efforts.

### BAD PERSONALIZATION: WRONG MESSAGE, WRONG PERSON, WRONG TIME

Tim does no research on his target account and sends the following message to an old email in their CRM for a marketing coordinator:

> *"Hey Britney! I can see that someone from your company is researching vanity numbers and I wanted to let you know I am here to help. Please email me a list of words you think would resonate with your audience and I'll see if they are available. Hope to hear from you soon, thanks."*

Separately, marketing is running general programs about call tracking services which don't relate to the product line the account is actually interested in.

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# Create a content journey map

Telling sales to personalize is easy. Doing it is another story. We've all been there: the sales team 'personalizes' their emails by merging in company names. That's not gonna cut it. To really enable personalization, you'll need to create a content journey map that maps the signals you're delivering to the content or messages you have.

For instance, if you're delivering competitor intent, make sure you're also delivering a few snippets or pieces of content that speak directly to that competitor, so sales has a way to be relevant.

### Personalizing to the person

Another type of personalization is actually trying to connect with the human on the other end of the email. Before sending the note, check out the target's social media accounts to see if you have a shared interest or background you could mention.

### Snippets, not templates

Creating templates for your sales team directly in their sales email tool (e.g. SalesLoft) is part of what drives bad personalization because it makes it easy to use the template with superficial personalization and move on. Remember, ABM isn't a volume game, it's a **quality game**. So it's going to take a fundamental change in your SDR behavior that optimizes every single touch to be highly relevant, highly meaningful, and above all not obnoxious.

You can help by delivering snippets — short phrases or sentences - that force reps to think critically about what they include in each touchpoint based on what they know about the person they're reaching out to. This might include an interesting fact you discovered on their LinkedIn that is unique to (or heavily promoted by) that contact.

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# Activation Labs: Actual Plays You Can Start Using Today

## Personalization Play #1

# Did we just become best friends?

If a target account begins demonstrating intent and engagement with your brand, consider the following:

1. **SDR notices engagement spike in an account**

2. **SDR researches the account**
    - Looks at anonymous contacts vs. known contacts and researches them on social media
    - Examines historical outreach to contacts and marketing campaigns
    - Identifies right people to contact

    Syncs with Marketing to understand any planned campaigns, if not covered in weekly meeting

**3. Create personalized messaging for emails** with personal information from social media, layered with knowledge of what URLs they're looking at. The goal here is to establish a positive, friendly relationship with this account as they are likely in contact with competing services.

### Rule of Thumb

Increase personalization in outreach based on level of engagement

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## Personalization Play #2

# You matter to me (i.e. high value accounts)

If a high-value account warrants a higher touch activation, consider the following:

1. **SDR notices engagement spike in an account**
2. **Sales researches the account on social media to discover a contact's interests**
3. **Sales delivers an email with a personalized video**
    - Personalized Video Email (handheld whiteboard gif with their name)
    - Sales also sends a relevant product to them via direct mail (i.e. if a lead is really into the Texas Longhorns, send them a Texas Longhorn pillow)
    - Note: some ABM teams establish workflows which enable sales to automatically send pre-approved direct mail pieces on an ad hoc basis.



**4. Marketing includes them and others in the account in an upcoming 1x1 campaign that shows your company's logo with their logo, displays their customer's names, shares specific KPI targets, shows a kill campaign for a competitor, and more.**

### Rule of Thumb

The higher value the account, the more channels and research you should commit to each touch. Assess your leads monthly to quarterly to determine which will warrant budget for personalized campaigns and activations.

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Personalization Play #3

# Teamwork makes the dream work

It can be difficult for marketing to get the right insights from AEs or CSMs to spin up personalized ads. You can use a simple Google form (or custom Salesforce object) to get the right information to marketing so they can efficiently run interference on your hottest accounts.

### If a sales rep has an existing relationship:

Ask sales for topics or personal information about the buying committee

**Example topics:**

1. A unique goal, challenge, or interest of the specific account.
2. A unique term that only means something to the specific account.

Marketing then creates a bespoke 1-1 ad experience (ad, landing page, personalized videos and emails, etc.) that proves it was created by a real human that knows about their company.

### If a sales rep does not have an existing relationship:

Sales researches the company's corporate goals and unique terminology in recent job posts.

If sales is unable to find compelling public information, Terminus researches the 5 categories of information that are readily available for almost any company.

- What department they sell to
- Their top competitors
- Competitive technology they use
- Compatible technology they use
- Customer logos on their site

This will enable you to create meaningful messages that are unique to the account. For example, you could create an ad that says, "[COMPANY] right now your best-fit customers are researching competitors like [COMPETITOR] — GET TO THEM FIRST."

  

## Prioritization Play #4

# Your SDRs' Cyber Monday

Every Monday, all reps should begin their day by leveraging a report in SFDC to organize their target account list. This report is the easiest way for SDRs and AEs to prioritize where they should be spending time at the beginning of their week. This helps take the guesswork out of follow up and helps marketing and sales stay aligned when accounts should be followed up with.

This report has Terminus Sales Insights filtered in and is sorted based on outreach needed for a given day:

- Shows most visited high value and awareness pages
- Show historical engagement, spike %, and if the account is heating up
- Shows the most active known contact
- Shows unique visitors which can tell you the size of the buying committee and if more contacts are needed.

Reps will start their morning post prospecting by digging into this report and tailoring messaging based on the Terminus metric that needs referenced. (i.e following up via email to a prospect(s) around a high value page that was visited and adding additional value)

Our team coaches look at all the Terminus signals in this report and marry these signals with engagement data to prioritize which accounts are showing buying signals.

In conjunction with Terminus reports, weekly engagement reports from Marketing are leveraged to prioritize calls, emails, LinkedIn outreach, personalized video, and direct mail.

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# Retention Play Give CSMs a *heads up* before a *break up*

Intent data can be a critical piece of information for CSMs, who otherwise might not know if an account is at risk for churning.

- By monitoring competitor search queries per your key accounts, you can prioritize outreach based on companies who are researching competitors.
- This often occurs during a time when your main internal champion has left or is under new management. Understanding why and how a company is looking up competing services is the first step towards retaining them.

Here's how:

**Step 1:** Create a view in SFDC that filters by CSM accounts with intent groups by intent data. Filter for just your competitive intent keywords like the brand names of your competitors.

**Step 2:** Provide your CSMs with a marketing battlecard that focuses on your company's key differentiators from your competitors so your success teams can elevate the ways your brand is superior.

- Often companies will already have these battlecards prepared for each competitor, so it might just be a matter of refreshing these cards if a competitor is offering a new service.

**PRO TIP**

This is a great time to highlight products or services that a customer isn't using but might be offered by the competitor they are researching.

LinkedIn found that **58% of sales and marketing professionals** believe better alignment delivers improved customer retention.

 

**Expansion Play**

# Help your CSMs take their relationship to the next level

Established enterprise corporations often have multiple departments with siloed tech stacks only available to key members within the organization.

By building campaigns about distinct product lines with features that would benefit different departments can be a great way to build a conversation that spans multiple departments, giving your CSMs the air cover they need to make upsells when engagement data and intent data indicate an account is ready to grow into a new product line.

- **Step 1**: Run account-based ads to distinct product lines and measure account engagement with content pieces and landing pages relevant to your offering.

- **Step 2:** Activate your CSM teams to have meaningful conversations around the problems that this offering solves with information about any competitors that may offer similar services.

# Proof of Concept: Why Our Customers <3 Alignment

*"My sales reps don't have to ask me, "Hey, how are these ads performing?" as they're going out and trying to penetrate them. They can just look at the account within Saleforce.com and see how much money they've spent, how many impressions we've driven, and what type of opportunity progression is occuring."*

—MALACHI THREADGILL, **Director of Demand Generation & Global Sales Development, Masergy**

*"If a certain campaign is doing well for a customer, we can send that information to the sales rep so that they know to make contact and talk about the specific campaign."*

—JUDSON VOSS, **Digital Marketing and Business Development Manager, Chart Industries**

*"Terminus has decreased conflict and increased the collaboration, which I think is a positive for how we grow our business."*

—LISA SKINNER, **VP Demand Generation, Localytics**

*"Our sales team know who to reach out to and when based on the activity that's happening in Terminus."*

—ALEXANDRA BARCA, **Sr. Marketing Manager, Bullhorn**

 

# Case Study: Activating the Masergy sales team at the right time

MASERGY

**CHALLENGE:** Masergy provides software-defined solutions for enterprise global networks, cybersecurity, and cloud communications, and faced a "good" problem of too many leads when they turned to Terminus for help. After a super successful marketing campaign that brought in 25,000 new leads, Masergy's sales team had no smart way to begin prioritizing. "Marketing gives leads to sales, and sales says, 'These aren't the right leads. These aren't the right customers,'" says Malachi Threadgill, Director of Demand Generation. "We brought in so much lead volume that our sales team didn't know where to start."

**SOLUTION:** Terminus Sales Insights saved the day for Masergy. By pushing key account data directly into Salesforce, their sales team was able to know who to reach out to, when, and how to personalize the outreach based on the product pages being visited. Terminus Account-Based Visitor ID brings together visits from known contacts and anonymous visitors to alert sales to account-level spikes in engagement (higher than usual), and when high value pages are visited, suggesting the account might be near closing.

**IMPACT:** Masery went from generating leads to generating and accelerating their pipeline, using Terminus activation tools.

## IMPACT

**250%**
increase in account penetration

**7X**
increase in opportunity creation

**50%**
higher opportunity MRR

**10%**
sales cycle reduction

**WINNER**
of SiriusDecisions' 2018 ABM Program of the Year

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# Case Study: Activating Snowflake's sales team with the right content

**CHALLENGE**: Snowflake is a leading provider of Data Management Solutions for Analytics. To drive awareness and begin building demand, .Snowflake wanted to positively engage decision makers at key accounts by surfacing relevant, personalized content through a multi-channel campaign effort.

**SOLUTION**: Snowflake created a scaled account-based marketing practice that lets them invest in high-quality content experiences. Structured like a field marketing organization. Snowflake has a team of account-based marketers responsible for running 1-to-1 campaigns alongside sales. Each campaign is built on bespoke content experiences and personalized messaging, developed in collaboration with the sales reps who know accounts best. Through Terminus, Snowflake is able to quickly launch digital advertising to distribute these experiences efficiently to the right audiences at the right time in their lifecycle.

**IMPACT**: Over 50 percent of the content consumption on Snowflake's website is coming from Terminus ads, and 50 percent of the content that is downloaded is coming from those top 500 target accounts.

  

# Case Study: Activating the Terminus sales team with the right accounts

terminus

### CHALLENGE

Sales was unhappy with the target accounts they received from marketing, which meant they weren't excited about going after those accounts.

### SOLUTION

The solution wasn't a tool. It was a culture shift. Away from a siloed approach to identifying leads and going after them to a collaborative one that used quantitative data from marketing using the Terminus platform to qualitative data from sales who are experts in the industry. The culture shift to a collaborative "no excuses" mentality helped everyone focus on a singular goal: growing the business.

### IMPACT

Through a culture shift and using the Terminus platform for data-driven insights, Terminus was able to drive efficiency and close more deals faster:

- 78% increase in first demo to close win rate from within 90 days
- Demo to interest conversion rate increased 48%
- Interest to win increased 35%
- Average deal size increased 20%
- Sales cycle decreased 20 days

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For more information, visit **terminus.com**