

DEMANDBASE

**PLAYBOOK**  
**ENGAGEMENT**



## **CONTENTS**

---

**3**

---

**INTRODUCTION**

**7**

---

**TARGETING &  
SEGMENTATION**

**15**

---

**CUSTOMIZING  
THE VISITOR  
EXPERIENCE**

**29**

---

**MEASURING  
ENGAGEMENT  
SUCCESS**

**31**

---

**ALIGNING  
RESOURCES &  
DEVELOPING  
WORKFLOW**

**34**

---

**USING  
THE ABM  
PLATFORM**

As B2B marketers, we spend a lot of time and money driving visitors to our websites. We invest in display advertising, PR, SEO, SEM, content, and various social channels. And while we may be successful in attracting visitors to our sites, the game is far from over once they arrive.

Our next, and arguably larger challenge is to deliver better, more relevant site experiences in order to get our prospects and customers to engage with us—to keep coming, stay longer, and more actively engage with our offers and content.

**Why? Because better connections with our customers can result in higher profits.**



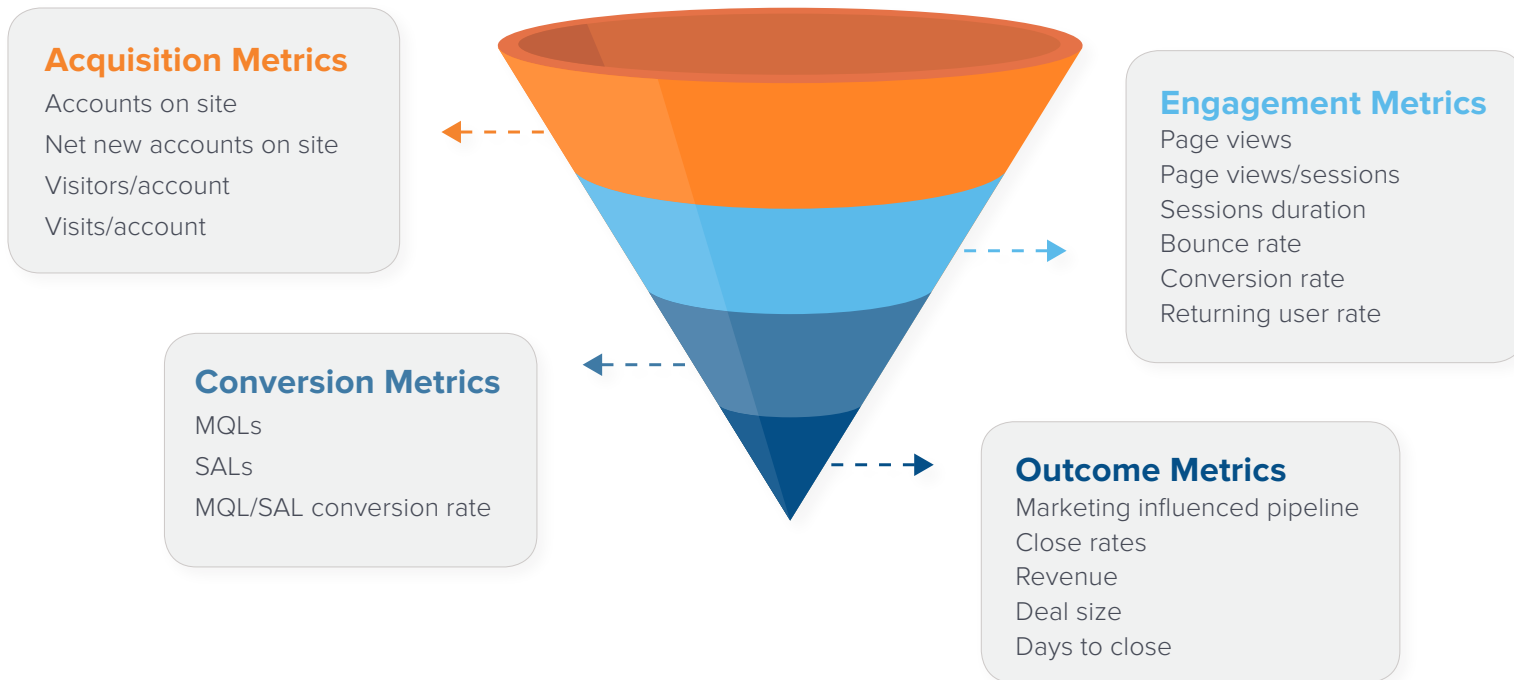
Demandbase found that target accounts who saw our ads and engaged on our website were **60%** more likely to turn into opportunities.

## SO, WHAT EXACTLY IS A “BETTER” OR “HIGHER BRAND” CONNECTION?

B2B marketers call it engagement and it's a critically important pillar of Account-Based Marketing (ABM) as we'll see shortly. First, let's start with a simple definition of engagement: by how it's measured. The following graphic details key ABM metrics across the full customer journey and highlights engagement metrics in particular.

Are potential customers hitting your site, but bouncing right away? Are they spending more time on site compared to last quarter, or less? Do they come and view two pages or six? Are they interacting with your content—filling out forms and downloading? These trackable behaviors are signals of engagement.

### ABM ENGAGEMENT METRICS FOR YOUR TARGET ACCOUNT USERS



## THE GOOD NEWS IS, OUR CUSTOMERS EXPECT US TO BUILD BETTER CONNECTIONS WITH THEM

*“People expect brands to be using the data they receive from them to create and deliver better experiences. Unfortunately, most teams are missing the mark.”*

- Forrester

While world-class engagement can be a challenge, when we get it right, we leap right to the front of the pack. In particular, leading b2b marketers who embrace ABM jump ahead by engaging those who represent the best opportunities—those from the right companies, industries, geographies, etc. Importantly, we want to zero in on those who are also displaying purchase intent—consuming online content related to our products and services.

Once we identify the companies who have real interest in our solutions, our job is to then launch them into an engagement path that accelerates their journey from unknown visitor to qualified sales opportunity. The challenge lies in a few hard facts around who actually visits our website and what they actually end up doing.

**82%**

of website visitors are  
not potential customers

*(Demandbase)*

**97%**

of website visitors  
never fillout a form

*(Adobe)*

**60%**

of website visitors leave  
after 10-20 seconds

*(Nielsen Norman Group)*

### MINI CASE STUDY: PROGRESS - ENGAGEMENT METRICS

Progress, a best-in-class platform for deploying apps, microservices and leading data connectivity quickly and easily, delivered personalized messaging across four key industries on their home and product pages. Showcasing relevant success stories and messages for each targeted industry, Progress was able to increase engagement by driving visitors deeper into the site, increasing pages viewed per session and decreasing exit rates. By focusing their personalization efforts on the industries that represented their best opportunities, **Progress increased engagement on the home page by 55%, and overall by 43%.**

## IF WE TRULY SEEK MARKETING ADVANTAGE, WE CAN'T KEEP PLAYING BY THE SAME OLD RULES

We have to roll up our sleeves and lean in on a stand-out engagement strategy that supports our ABM efforts. Indeed, engagement is a key part of successful ABM practice. To see how, let's start with a quick reminder of why B2B marketers invest in ABM in the first place:



### The best opportunities

The practice of ABM ensures attention is given to top prospects and customers.



### Sales reality

Marketing becomes more efficient when focused on a defined universe.



### Customer-centric experiences

Increases customer engagement, satisfaction, loyalty and retention.



### Marketing's impact

Connecting activities to business outcomes makes marketing ROI easy to measure.

Engagement falls squarely under delivering customer-centric experiences. One of the key reasons we practice ABM is to cut down on noise, increase relevance, and get our customers and prospects to deepen their connection to us through customer-centric experiences. Here are the fundamentals you'll need to master in order to build, scale and optimize engagement to keep your ABM practice humming on all cylinders. We'll unpack each of them in the next four sections.

**1. Building the foundation: targeting and segmentation**

**3. Measuring engagement success**

**2. Customizing the visitor experience**

**4. Aligning resources and developing workflow**



## 1. BUILDING THE FOUNDATION: TARGETING AND SEGMENTATION

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When it comes to B2B marketing, there are several tried and true lenses which you can apply to your audience in order to create meaningful—and importantly— differentiated segments:

- 1. Industry** - Industry verticals are one of the most common ways B2B companies approach their markets, and one of the most successful. Why? Because industry verticals tend to have unique and specific attributes, pain points, and goals. Financial services companies tend to be more conservative and can often be focused on compliance issues, for instance, whereas manufacturers typically care more about cost and time to value. Retailers care about maximizing loyalty and customer lifetime value, while software and technology companies are laser focused on innovation. Because we typically get just one chance to make a good impression, focusing your personalization strategy on the right issues for your industry visitors is a great way to demonstrate that you know what matters to them—and that your solutions are the right fit for their particular needs.
- 2. Company size (employee size or annual revenue)** - Mid-market companies typically face much different challenges than SMBs or enterprise organizations. They also have different buying committees, sales cycles and decision processes. Mid-market tech companies may be focused on producing productivity gains, while enterprise tech companies may have their sights set on deeper investments in machine learning. Small business tech organizations, on the other hand, are often concerned with creating scale. Just as with industries, your offerings and messages may be aligned with organization size.
- 3. Journey stage** - Various content offers can play significantly different roles at different stages in the buying cycle from a paper that defines an industry problem (awareness-focused content), to data sheets that describe your particular value proposition (engagement-focused), to an RFP checklist (consideration-focused). If you're ready to double down on a segmentation strategy focused on the customer journey, oftentimes the first place to begin is with the creation of a customer journey map.
- 4. Product usage** - Segmenting by product usage is particularly useful for developing engagement strategies that advance cross-sell and upsell opportunities. If you know you've sold a customer a printer, an obvious follow up customer experience would be to present them with an offer to buy ink.
- 5. Customer/Prospect/Partner**- Whether you're trying to land new business, expand opportunities with a current customer or deepen a relationship with a partner, you'll want to create relevant, targeted messages that resonate with each. Prospects may need to know more about who you are and what you do, while customers may respond well to special offers for upsells. Partners, on the other hand, may be best motivated by reminders of your position as an industry leader.

SEGMENT	ATTRIBUTE
Industry	Software and Technology - Healthcare - Financial Services

**Table 1.** Example of simple segmentation—one primary segment, industry, with three unique attributes, software & technology, healthcare, and financial services.

SEGMENT	ATTRIBUTE
Industry	Software and Technology - Healthcare
Web Traffic	High - Medium
Marketing Tech Used	Analytics: Adobe or Google Analytics, and MAS: Eloqua or Pardot
Geography	US - Canada

**Table 2.** Example of multi-attribute segmentation. In this case, the companies we want to target are either in software and technology or healthcare with medium or high volumes of web traffic that use specific marketing technologies and are headquartered in either Canada or the US.

### MINI CASE STUDY: OUTSYSTEMS - JOURNEY STAGE PERSONALIZATION

Outsystems, a supplier of low-code development coupled with advanced mobile capabilities, sought to focus on acquiring new accounts plus expanding business with current customers. They used account-based advertising to attract the right accounts to their website, but also used a three-stage funnel-based personalization strategy to deliver unique, customized messages to guide customers and prospects through the buying process. Outsystems' personalization strategy led to a 3.6x increase in content consumption and a 59% increase in page views. *(Hint: Increased engagement is a leading indicator to increased win rates and decreased time to close in the sales funnel.)*



SEGMENT	ATTRIBUTE	BASIC CRITERIA + FIT + TIMELY EVENT
<ul style="list-style-type: none"> <li>• Revenue</li> <li>• Headcount</li> <li>• Region</li> <li>• Industry</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrating a need</li> <li>• Showing interest in our value proposition</li> </ul>	<ul style="list-style-type: none"> <li>• Researching relevant topics</li> <li>• Engaging with site content</li> <li>• Presence of a buying committee</li> </ul>

**Table 3.** Example of advanced segmentation that uses multiple criteria

## How Do You Know if You Have the Right Segmentation Strategy?

It's important to ask yourself a few key questions before you settle in on your approach:

- Are your segments truly different in a meaningful way?
- Are your segments large enough?
- Do each of your target accounts fall clearly into one segment or another?

*If the answer to any of the above questions is no, revisit your segmentation strategy until you arrive at a model in which each segment is uniquely differentiated.*

### MINI CASE STUDY: BROCADE - FOCUSED SEGMENTATION STRATEGY

Networking solutions industry leader Brocade began their personalization strategy by focusing on one industry—healthcare—and on one web page—their home page. They featured banners to visitors from healthcare companies that guided them along a path of targeted healthcare content. In turn, Brocade saw a 144% increase in click throughs on the home page banner and a 53% reduction in bounce rates on the home page. By sending healthcare company visitors down a personalized path of relevant content, Brocade also saw a 36% increase in video views, a 46% increase in page views, an 86% increase in file downloads and a 26% increase in time on site.

## Common Segmentation Mistakes to Avoid



### Segmenting a segment

Targeting “auto manufacturers in California”, for instance, is probably not worth your while because geography isn’t really relevant. Your engagement efforts will scale much more readily if you drop the “California” and present similar messages to any auto manufacturer you target, rather than splitting hairs by geography. When trying to achieve scale, look for common messages that cut across the smaller sub segments and speak to the issues of the larger segment.



### Overlooking universals

Segments should be mutually exclusive. If they share universals—the same values across attributes—they won’t be. For instance, if you only sell to enterprise organizations and define a segment using the length of a sales-cycle, the value of that attribute will always be long. If your definition of an attribute results in universal values across multiple segments, get rid of it.



### Too many segments

Declaring that you’re going to go after dozens of segments in a differentiated way is impractical. Your segments will wind up being too small, you’ll have challenges creating differentiated messages and content for each, and you won’t be able to target effectively. B2C companies have more latitude in creating many rather than fewer segments because their audiences are much larger than those for B2B. While it’s not uncommon for a B2C retailer to define 10 to 12 customer segments, the average B2B typically focuses on 3 to 4.



### Targeting all segments

Don’t lose focus on your best opportunities. Just because you’ve chosen company size as a key segmentation attribute, it doesn’t mean you have to go after enterprise, mid-market AND small business opportunities. Only go after the segments that represent look-alikes for your best customers.



## Segmentation Worksheet 1

Identify the number of segments for each approach, their unique challenges and what your key messages might be for each. *A segment example has been provided to get you started.*

SEGMENT APPROACH	SEGMENT	KEY PAIN/CHALLENGE	KEY MESSAGE
Industry	Software & Tech		



## Segmentation Worksheet 2

Determine which segments represent your best opportunities. Identify the key attributes, values and messages for each.

SEGMENT	ATTRIBUTE	VALUES	KEY MESSAGE



## Segmentation Health Check

Use this check list to determine the viability of a segment.  
*Review for each group of accounts.*

- Are your segments truly different in a meaningful way?
- Are your segments large enough?
- Do each of your target accounts fall clearly into one segment or another?
- Do more than one of your segments contain common universal values?
- Have you segmented a segment—sliced your opportunities too thinly?
- Are you planning to tackle more segments that you can manage?
- Do the segments you've chosen represent your best opportunities
- Can you make significant inroads into your chosen segments profitably?
- Do the segments you've chosen represent growth opportunities?
- Does sales leadership agree that these segments offer the best opportunities for your business?
- Do you have a process in place for iterating on or updating your segmentation strategy on a regular basis?

## KEY SEGMENTATION TAKEAWAYS

- Focus on your best opportunities
- Start simply – one or two segments
- Segments should be unique in a meaningful way
- Segments should be large enough to provide scale
- Target accounts should fall clearly into one segment or another
- Don't attempt to segment within a segment
- Have alignment amongst all key stakeholders regarding your targets and segmentation strategy
- Stay abreast of current industry trends in order to demonstrate you know and care about what your customers care about
- Seek input from anyone in your organization that has a vested interest in making inroads into any of the segments you've identified.

## 2. CUSTOMIZING THE VISITOR EXPERIENCE

Thanks to leading B2C companies like Amazon and Netflix, today's B2B buyers want to engage with companies that provide highly-tailored ideas and information oriented to their specific business, industry, role and needs—in other words, **personalized**.

**60%**

Sixty percent of buyers believe personalization is valuable  
*(ITSMA)*

**10% - 30%**

Up to thirty percent increase in the efficiency of marketing spend due to personalization  
*(McKinsey & Company)*

**5% - 15%**

Up to fifteen percent in lifted revenues as a result of personalization  
*(McKinsey & Company)*

### Assess Your Content Inventory

Before you begin to layout your personalization strategy, it's a good idea to conduct an audit of your existing content. A content audit will help you inventory all of your usable assets, such as eBooks, whitepapers, images, video files, headline and body copy, etc. By identifying what you already have, you may realize that you don't have to create new assets; you may just need to organize them, based on the same attributes used to create your segments, and ensure that they can easily be found. Use this as an opportunity to evaluate two additional factors:



#### Is a piece of content past its shelf life?

A customer case study that is 2 years old should probably be updated or retired, whereas a Definitive Guide may still be current, or may require just minor editing.



#### Do you have assets that cover both your primary segmentation and the full buyer journey?

Even if you aren't segmenting by journey stage, it's still best to have a range of assets that cover awareness, evaluation and decision, as well as a mix of content types (video, webinar, white paper, etc.)



ASSET TITLE	AUDIENCE	CONTENT OWNER	DATE OF CREATION	TYPE OF ASSET	JOURNEY STAGE
Account Based Marketing for Financial Services	Financial Services Prospects, Customers	Product Marketing	January 2016	eBook	Awareness
The State of B2B Advertising for Financial Services	Financial Services Prospects, Customers, Partners	Digital Marketing	April 2018	eBook	Awareness
Case Study: Broadbridge Gains Clarity and Precision with Target Audiences	Financial Services Prospects	Customer Marketing	January 2017	Video	Evaluation
How to Create and Measure an Account-Based Marketing Strategy	All Industries Prospects, Customers	Product Marketing	March 2017	Webinar	Awareness
Unifying Your ABM Strategy with a Single Platform	All Industries Prospects, Customers, Partners	Product Marketing	February 2018	Webinar	Evaluation
Full Demo Demandbase Platform	All Industries Prospects	Consulting Team	August 2018	Webinar	Evaluation

**Table 4.** Example of a content inventory for a Financial Services industry segment. This is just a small sample—you should have 5-10 assets for each segment.

## What's Working Now, What's not?

Use your web analytics to understand how your current content is performing and what types of content your B2B target audience prefers. Some areas of focus include:

- Where on the site is the asset currently located?
- What are the primary paths visitors are taking to get to the assets?
- Is the asset high-value?
- How has the asset been performing?
- What needs to be done to improve the performance of this asset?

## Filling in the Content Gaps

With an inventory of current content complete, you can easily determine whether or not you need to create new, high-value content. Using the Financial Services industry example from table 4, the audit shows a mix of Awareness and Evaluation assets, but no late stage assets. This would be an area you would want to consider adding late stage cross-industry content.

ASSET TITLE	AUDIENCE	CONTENT OWNER	TYPE OF ASSET	JOURNEY STAGE
Vendor Selection Checklist	Cross-industry Late-stage Prospects	Product Marketing	TBD	Decision
ROI Case Studies (2)	Financial Services Late-stage Prospects	Customer Marketing	TBD	Decision
Account Based Marketing for Financial Services	Cross-industry Late-stage Prospects	Customer Marketing	TBD	Decision

**Table 5.** Example of content gaps

## Site Customization: Start Simply

Based on our experience with hundreds of B2B companies, we've found that the simpler the personalized experience is, the better. A single change in the text or an image can have a significant impact on decreasing bounce rates and increasing time on site.

The first and most important step is to prepare, prepare, prepare. Discuss your web engagement strategy with your marketing teams, web team, product marketing team (for content and messaging), and other stakeholders. Often times companies begin their engagement strategies with small changes, like a shift in industry messaging, and see great success by simply adjusting the home page banner to be industry specific. For example, a different visual and/or headline for each of your target industries.

## Customization Rules

With the Demandbase platform, it isn't necessary for a web developer to manually customize multiple versions of a single page for various audiences. You simply define rules within the platform that drive real-time customization based on which company has come to your site. This doesn't require extensive HTML knowledge and with the Demandbase plugin you're able to easily go to your website and identify what content you want to dynamically personalize.

We recommend you define your rules on paper in plain English (with input and consensus from your marketing, sales, web, and product marketing teams) before you begin to work with the Demandbase Site Customization tool.

IF VISITOR IS...	CHANGE THIS VISUAL...	CHANGE THIS TEXT...	CHANGE THIS CONTENT...
From a target hospital	Change banner image to hospital.png  Replace Green Buildings Council logo with ASHE logo	Change tagline to: Cost. Efficiency. Savings.	Replace generic case studies with: Chase Medical case study Good Samaritan case study

**Table 6.** Example of customization rules for a website for a fictitious building automation provider (ABC Building Automation). The primary target segments for this company are hospitals and universities.

## Site Customization Examples

**ABC Building Automation**

Comfort. Efficiency. Savings. For any business environment.

ABC Building Automation help building owners make commercial environments more comfortable and safe for occupants, while enjoying the benefits of increased efficiency and energy cost savings. Intelligent buildings are just the way of the future – they're here today. Whether it's lighting, HVAC and security systems, you can count on us to meet all of your building needs.

**Case Study**  
XYZ Corp saves \$15,000 per year through greater energy efficiency. Read now.

**Case Study**  
PQR Group reduces building humidity. Read now.

**New Research**  
Impact of intelligent automation on occupant employees. Read now.

Lighting HVAC Security

IFMA

About ABC Contact

**Image 1.** ABC's website uses a template that defines the placement of the individual page elements in addition to overall branding. Using a pre-designed layout allows you to place custom imagery and text into the designated page elements, or widgets.

**ABC Building Automation**  
 Comfort. Efficiency. Savings. For any medical environment.

ABC Building Automation help building owners make commercial environments more comfortable and safe for occupants, while enjoying the benefits of increased efficiency and energy cost savings. Intelligent buildings are just the way of the future – they're here today. Whether it's lighting, HVAC and security systems, you can count on us to meet all of your building needs.

**Case Study**  
 Chase Medical saves \$15,000 per year through greater energy efficiency. Read now.

**Case Study**  
 Good Samaritan Hospital reduces OR humidity. Read now.

**New Research**  
 Impact of intelligent automation on hospital staff and patients. Read now.

ASHE  
 IFMA

About ABC Contact

**Image 2.** This example shows ABC's website customized for hospitals with an updated header image, tagline and content.

## Multi-Channel Customization

A B2B buyer's journey is rarely linear. It's important to deliver a consistent message from ads, to landing pages, to web pages.

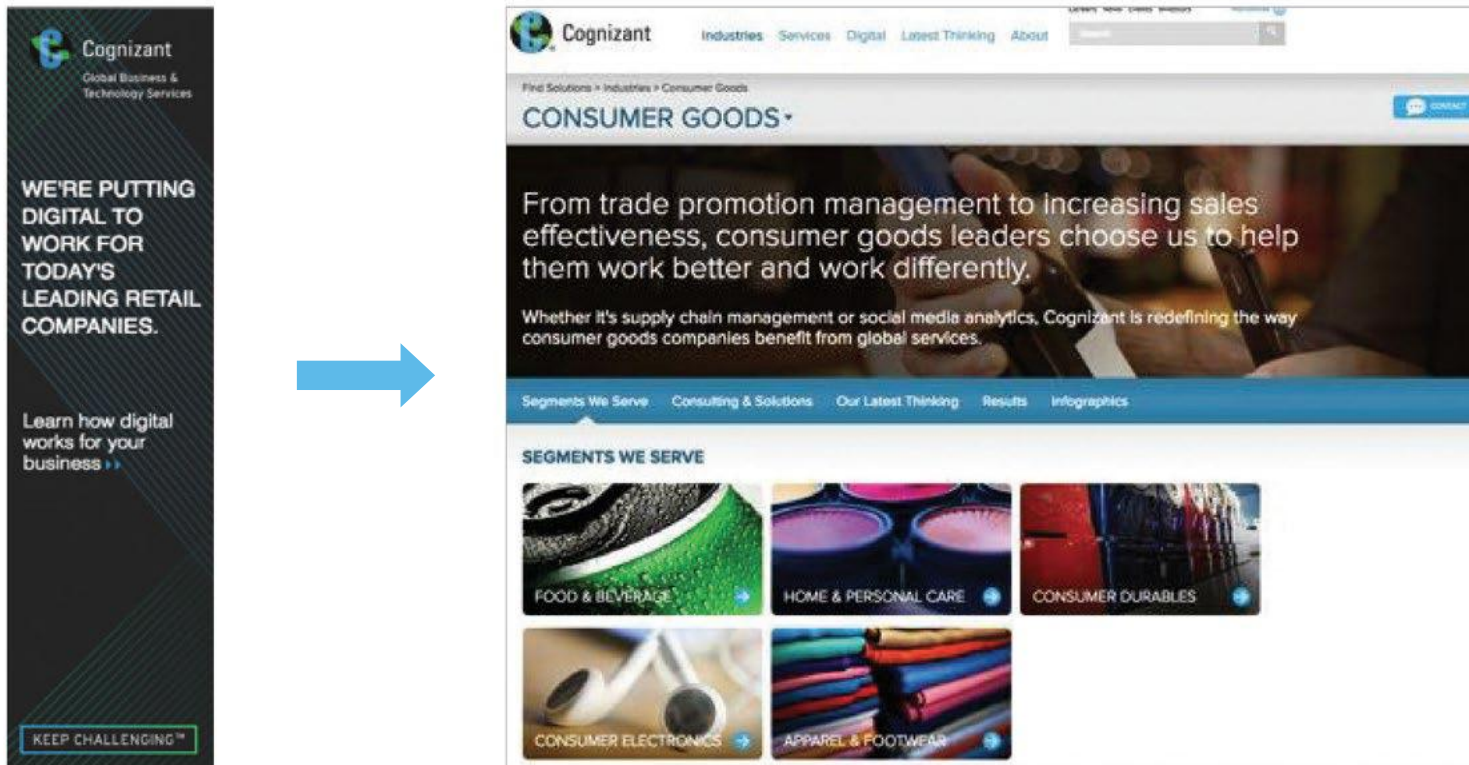


Image 3. Example of ad-to-landing page



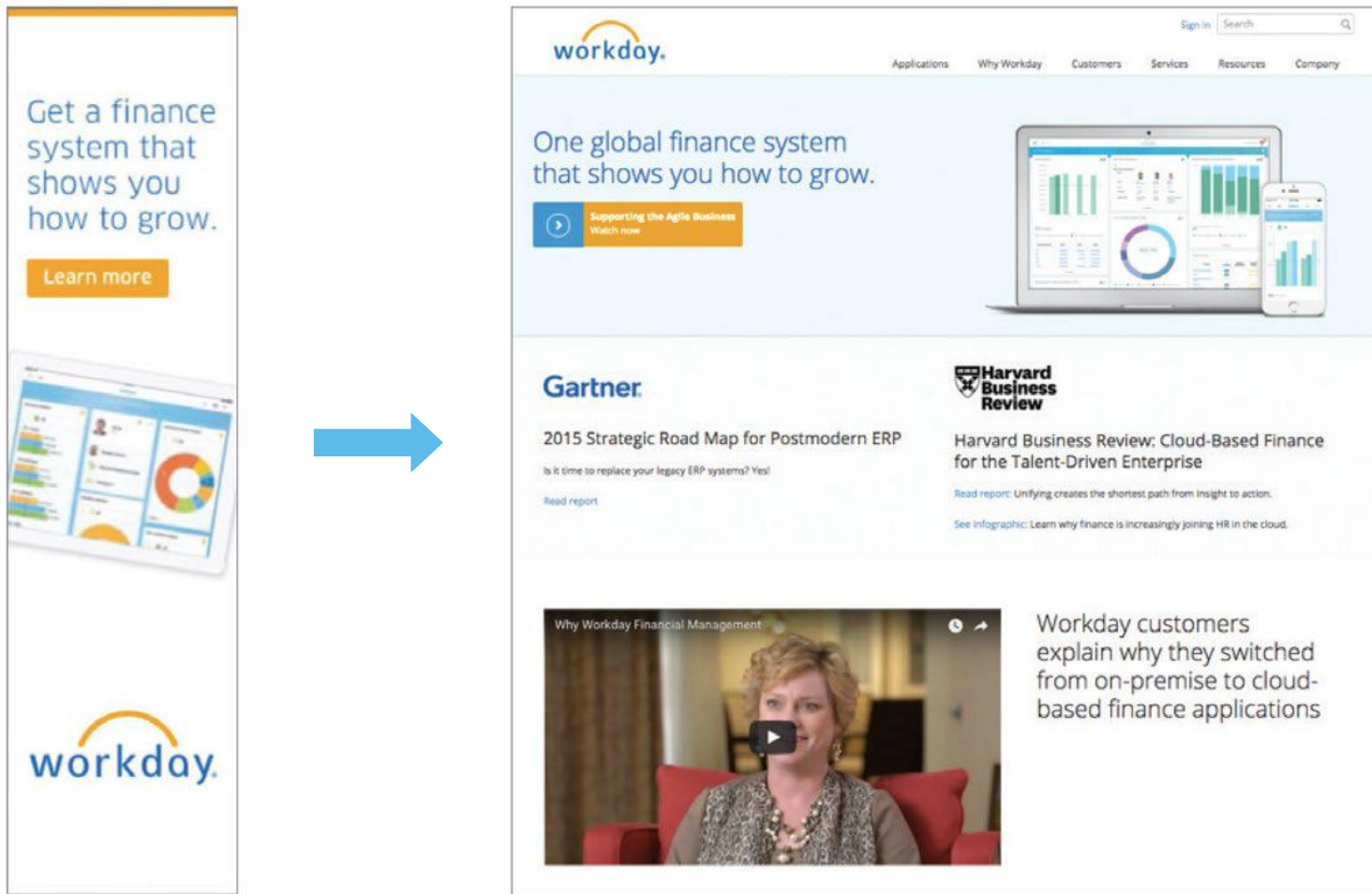


Image 4. Example of ad-to-landing page





A screenshot of the Demandbase website. The page title is "7 ways the mobile consumer changes everything". The article text discusses mobile commerce trends, such as the projected 65% increase in mobile purchases in two years. It includes a list of three key points: online reviews, holiday shopping habits, and where mobile purchases occur. Below the text are social sharing options and a "Share this page" section. The page also features a "You may also like" section with two related articles: "Volume 6: Learn how to double purchase intent after a bad review" and "The role of mobile in your brand's omnichannel strategy". On the right side, there is a green sidebar with the heading "Get the whitepaper" and a form with fields for First Name, Last Name, Job Title, Email Address, and Company Name, followed by a "Download" button.

Image 5. Example of an ad-to-conversion page engagement

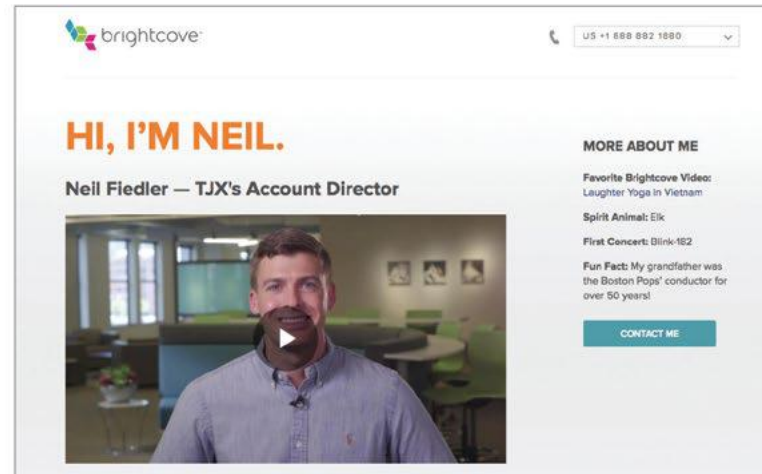


Image 6. Example of an ad-to-onsite web personalization

## Company Name, or No Company Name?

That is the question we discuss with many Demandbase clients and there is no definitive answer. Some customers have seen a lift in engagement when using customer names as part of their personalization strategy, especially in advertising. Others consider it to be “creepy” especially if a visitor has not identified themselves by completing a form.

At Demandbase, we don’t recommend that you use company name unless you are certain your data is accurate and you test it with a small segment before scaling across your site. A few areas where you might consider testing it include:

- Tied to customer login
- Thank you page after a form completion
- Homepage welcome for your best customers
- Personalized advertising

## Reduce Form Friction

Today, with the shift to buyer control and centrality, forms have become a friction point. Web visitors simply don’t want to fill them out. They’re too long, they interrupt the visitor’s search for information, they’re repetitive, and they are error prone – suddenly everything you just entered disappears. When visitors do complete a form, the information is often false.

Demandbase Engagement solution reduces form friction by appending data in real time to a visitor’s form. An optimized form might ask for 3-4 basic questions, such as the visitor’s name, email address and phone number. Demandbase then appends more than 40 firmographic data attributes including the visitor’s company affiliation, mailing address, revenue and other data points. The benefits of this approach include more form fills, triple-verified company identification, and a more manageable database with standardized and normalized data.

*For each field eliminated  
conversion rate increases 8.5%*

The diagram illustrates the process of reducing form friction. On the left, a 'SIGN UP' form is shown with 12 input fields: Full Name, Email, Title, Phone, Company, Industry, Address, Website, Revenue, and Number of Employees. Below the fields is a checkbox for 'I agree to the Terms of Service & Privacy Policy' and a 'SUBMIT' button. On the right, the same form is shown, but with a 'DEMANDBASE' overlay that pre-fills the fields. The overlay is titled 'DEMANDBASE Demandbase Hidden Fields' and lists the fields: Full Name, Email, Title, Phone, Company, Industry, Address, Website, Revenue, and Number of Employees. The 'SIGN UP' form is now smaller, with only 4 input fields: Full Name, Email, Phone, and Company. The 'SUBMIT' button is also present. A blue arrow points from the original form to the optimized one.

## Personalize Chat Sessions

Live chat can help build trust with buyers by providing subject matter expertise at the point of engagement. Chat personalization can be as simple as acknowledging a client by name, or a bit more advanced, aligning the chat experience to where the visitor is on your site.

**20%**

Conversations increase by twenty percent due to personalized chats  
*(Forrester)*

**3X**

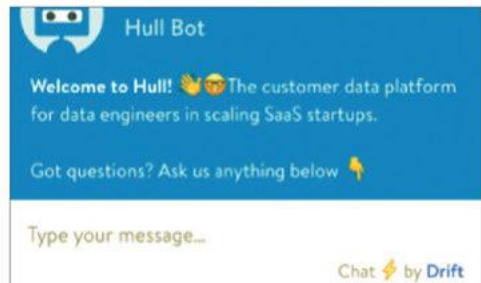
Customer are three times more likely to buy as a result of personal chats  
*(Forrester)*

**305%**

Return on Investment when implementing personal sales chats  
*(Insite Software)*

**120%**

Return on Investment as a result of customer service chats  
*(Insite Software)*



Home page chat bot  
*(Awareness)*



Blog chat  
*(Education)*



Solution page chat  
*(Decisions)*



## Customize Worksheet 1

Assess your content inventory. A segment example has been provided to get you started.

ASSET TITLE	AUDIENCE	CONTENT OWNER	DATE OF CREATION	TYPE OF ASSET	JOURNEY STAGE
ABM for Financial Services	Financial Services, Prospects, Customers	Product Marketing	January 2016	eBook	Awareness



## Customize Worksheet 2

Assess the performance of your current assets. *A segment example has been provided to get you started.*

ASSET TITLE	WEB LOCATION	VALUE	GATED	TRAFFIC SOURCE	PERFORMANCE OF ASSET	AREAS FOR IMPROVEMENT
ABM for Financial Services; Building a Framework	<a href="http://www.demandbase.com/ebook/account-based-marketing-for-financial-services">www.demandbase.com/ebook/account-based-marketing-for-financial-services</a>	High	No	Display	125 clicks 100 downloads 45 pipe	Update front cover and display ads to images that reflect the financial industry

### 3. MEASURING ENGAGEMENT SUCCESS

It's impossible to measure the success of your engagement activities without establishing a baseline of the current level of activity within your chosen segment. A baseline is a metric you establish which provides a foundation for making comparisons of past performance to current performance.

When you first start out, it is important to establish baselines for each of these fundamentals. Some examples could be, page visits from target accounts, percentage of visits that are coming from your Ideal Customer Profile, or number of unique, active users on your site.

Like high blood pressure is a leading indicator for heart disease, and aerobic activity is a leading indicator for heart health, engagement metrics are leading indicators for positive business outcomes. Engagement metrics are mid-funnel, forward-looking diagnostics that provide a look at how you are likely to perform down the road at the bottom of the funnel.

Measuring engagement alone is not enough. Customers who open emails at a higher rate, bounce less often and view more pages on your site are great—but not as great as customers who make it through the sales funnel faster, spend more, and remain customers for longer periods. It's critically important to be able to make the link between your personalization efforts and actual business results. Unless you're able to tie your personalization efforts to real business outcomes like higher closing ratios, bigger deal sizes and increased funnel velocity, your personalization success stories will fall on the deaf ears of your business' leadership team.

Here's a handy list of business outcomes that your leadership team is sure to get excited about if you measure your personalization strategies against them:

- Sales revenue
- Average deal size
- Funnel velocity
- Renewal \$
- Cost/inbound opportunity
- Upsell \$

#### MINI CASE STUDY: BRIGHTCOVE - BUSINESS OUTCOMES

Brightcove, a pioneering force in the world of online video, helps thousands of customers to leverage the unmatched power of video to educate, inspire, entertain, communicate, and move their business in meaningful ways. Brightcove tapped personalization to deliver unique, industry-specific messages that were differentiated based on whether site visitors were coming from customers or prospects. Their personalization strategy coupled with ABM-focused sales and marketing alignment resulted in the scheduling of 86 meetings, and an additional \$200K in opportunity pipeline.





## Engagement Worksheet 1

It's impossible to measure the success of your engagement activities without establishing a baseline of the current level of activity within your chosen segment.

Pick a time period that offers enough historical data, then use that for comparison purposes moving forward. For example, use Q1 to establish your baseline and then compare your Q2 results to the Q1 baseline.

METRIC	SOURCE	BASELINE	Q1	Q2	Q3	Q4
Page views						
Page views/sessions						
Sessions duration						
Bounce rate						
Conversion rate						
Returning user rate						

#### 4. ALIGNING RESOURCES & DEVELOPING WORKFLOW

Recall that ABM focuses on your best opportunities, supports sales' reality, provides customer-centric experiences, and connects marketing to revenue. As such, the practice of ABM is a marketing team sport, involving all key roles in the marketing department. While operationalizing your web engagement strategy will mostly involve your web development and/or digital marketing team, engagement is best approached as a part of a greater ABM strategy rather than in isolation.

ROLE	AUDIENCE	CURRENT OWNER	TYPE OF ASSET
Marketing ops/ analytics	Implement tracking process Baseline key metrics	Gather key metrics and report KPIs and insights weekly	Revise: funnel model, forecasts, goals
Sales & mkg leadership	Agree on targets Apply segmentation Build audiences	Provide target account web engagement data to sales weekly. Receive sales outreach updates weekly	Revise: Target account list, Segmentation strategy, Sales and marketing alignment practices
Digital Marketing	Personalize high value pages by segment Optimize forms Optimize content offers	Go live with personalized pages, optimized forms and content offers	Revise: Personalized experiences, Form, content optimization
Campaign Owners	Develop targeted content and messages Develop segmented campaign creatives	Enable sales with campaign insights and resources for action	Revise: Creative, Content

**Table 7.** Example of how successful practitioners typically divide and conquer



### Workflow Worksheet 1

Align your resources using the below worksheet. See *Table. 7 for example*

ROLE	AUDIENCE	CURRENT OWNER	TYPE OF ASSET



## Operationalizing Your Engagement Strategy Checklist

Use this check list to bring your ABM initiatives— including engagement—to market:

- Finalize target account list with sales leadership.
- Finalize segmentation strategy, identify the segment attributes you'll speak to, and the key messages you'll put in market for each (*Hint: Limit your personalization efforts to 3 to 4 differentiated experiences*).
- Determine whether you will increase awareness, engagement or conversion for each segment
- Identify creative and web development resources needed to execute.
- Define goals and how you'll measure success for your personalization strategy.
- Identify target pages for personalization (*Hint: Start with the home page, forms and/or other key conversion pages, e.g., content download or contact pages. Begin with 2-3 target pages max*).
- Develop creative strategy (*Hint: combine themes, key messages, calls to action and imagery for maximum impact*).
- Assemble new assets for each new personalized experience and develop, deploy and test personalized pages.
- Run personalization plan for a defined test period and measure results
- Identify areas for improvement and develop hypothesis
- A/B test improvement hypotheses, measure results, implement those that achieve the best results.
- Scale optimized personalization across additional segments and pages (*Hint: optimize the experience from "click to close", e.g., repeat/reinforce messages across each page in the experience path*).

## HOW DEMANDBASE APPROACHES ENGAGEMENT USING THE ABM PLATFORM

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Now that we've covered the foundations and considerations for approaching your personalization strategy, let's dive into how to execute it with Demandbase. In this section we'll cover the features you'll need to use to execute an engagement strategy, how to implement it and how to measure the results.

In this case study, you'll see how we approached our personalization and engagement strategy for the promotion of a new product line which include display ads, website personalization and funnel impact measurement. But before we get to those, let's discuss the parts of the application we used to set up this campaign.

### Custom Attributes – What They Are & Why You Should Care

Custom Attributes (formerly known as Account Watch Lists) are the connective tissue between your account Audiences, website analytics, and website or advertising personalization. Because they include both Demandbase and first-party data, they can contain information such as firmographic attributes, first-party data points like funnel stage or product adoption, as well as intent insights – all of which can be used to deliver personalized experiences.

In considering which data points to use, you should start with the factors which define your account Audiences on the Platform. For more information on how to select these, check out our [ABM Playbook: Audience and Profile Management Best Practices for the ABM Platform](#).

With this in mind, let's now turn our attention to how to execute on the topics covered in this guide to engagement using a real-life example from Demandbase. In this case study, we'll cover:

- How to Identify the best accounts for a campaign
- How to implement tracking for these accounts in website analytics using Custom Attributes and review performance reports
- How to implement low-lift, AI-drive personalization with Site Optimization
- How to implement personalization on the website with Site Customization
- Examples of the creative journey from a real world Demandbase direct-mail campaign incorporated with personalization

## How to Identify the Best Accounts for a Campaign

In any given quarter, we're launching a host of marketing campaigns designed to reach and engage our target accounts. And without fail, direct mail is always one of them. Mostly because it works well and is a great foot in the door. But it works even better if we choose the best accounts and create a personalized experience for them.

To accomplish this, we take our entire target account list and prioritize the top accounts which are showing intent for a corresponding theme: often it's account-based marketing and our solutions, but in this case advertising tech. Using our Account Selection product, we can easily rank these accounts and get to a refined list of the best accounts for this campaign, this quarter.

For more information on how to best use Account Selection, check out our [ABM Playbook on Identifying the Right Accounts for Account-Based Marketing](#).

The screenshot displays the 'DB4K From CRM - Dynamic (2,553)' account selection interface. It features a search bar, saved filters, and a list of filtered accounts. The accounts are ranked based on their overall score and sessions. The top two accounts are:

Rank	Account Name and Info	Overall Score	Sessions	Top Trending Intent
1	<b>Charles River Laboratories International Inc</b> Pharmaceuticals Revenue \$1B - \$2.5B Wilmington, MA <a href="http://criver.com">http://criver.com</a>	High	0	viewability b2b marketing customer acquisition <a href="#">View More</a>
2	<b>American Express Co</b> Financial Services Revenue Over \$5B+ New York, NY <a href="http://americanexpress.com">http://americanexpress.com</a>	High	33	web analytics b2b payments tech target <a href="#">View More</a>

The interface also includes a sidebar with filters for 'With Trending On-site Engagement', 'With Trending Off-site Intent', and 'Accounts being targeted'. The 'INTENT' section is expanded, showing various intent categories like 'advertising spend', 'audience targeting', and 'b2b advertising'. A 'TRENDING INTENT' section is also visible at the bottom. On the right side, there is an 'Actions (0 Selected)' panel with options like 'Save List as an Audience', 'Add Account(s)', and 'Hide Selected Accounts'.

Image 7. Example of a prioritized list of target accounts

## Implementing and Measuring Account-Based Website Analytics Using Account Watch

With our list of companies for the direct mail campaign, we add a value to our Account Watch to flag these specific accounts. This value can either be a net new field which requires additional implementation set-up or you can choose to adjust a pre-existing value to designate the unique identifier. If you're setting up your Account Watch for the first time, get more details on implementing that from the [Demandbase Knowledge Base](#).

With Custom Attributes set up and data flowing both to Website Analytics and the Engagement Solution on the ABM Platform, you're ready to begin setting up performance reports and personalized experiences. With this account flag in our website analytics, we sort the traffic to the landing page by accounts who received the direct mail compared to those which didn't, to see how the personalized experience is impacting website engagement. Quickly we can see that accounts who receive the direct mail and the full integrated and personalized experience are far more engaged than accounts which did not.

Using the same Custom Attribute, we customize the hero banner for our home page and the preferred landing page for the accompanying display ads so that whenever a visitor from one of those accounts hits those pages they see imagery which is aligned with the direct mail and the display ads. In doing so, we've created unified messaging for these accounts across the buyer's journey, regardless of the point of engagement.

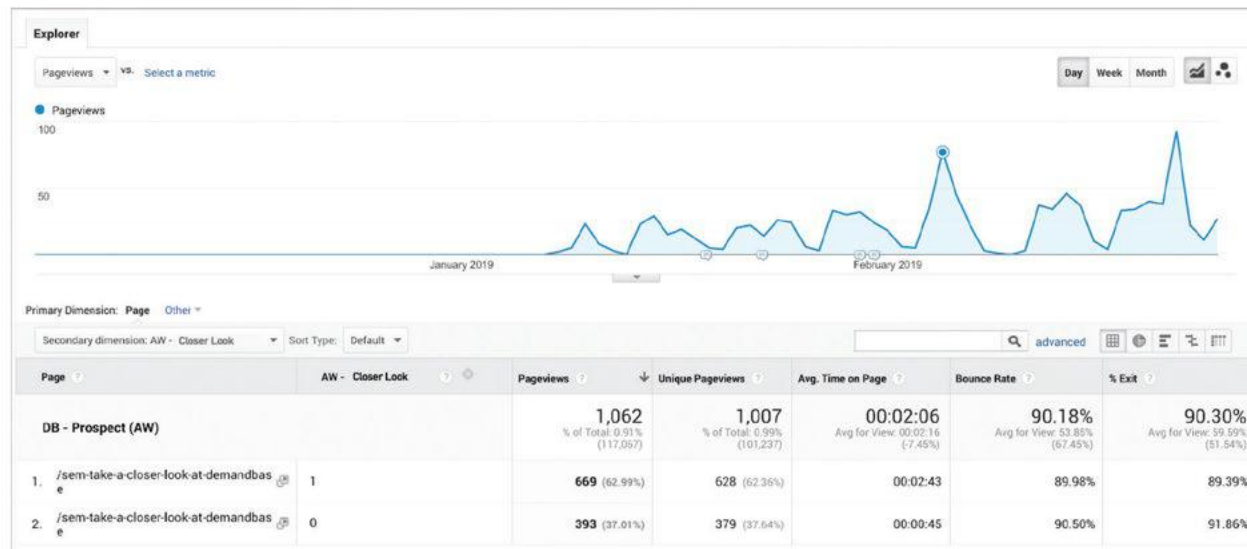


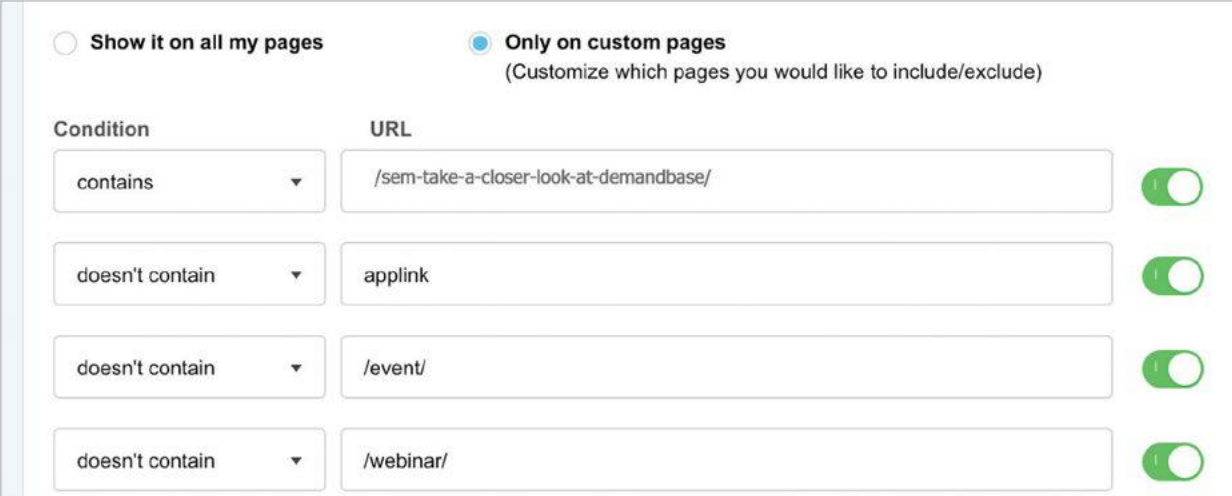
Image 8. Account Watch

## How to Implement Low-Lift, AI-Drive Personalization With Site Optimization

Site Optimization's mission is to use the data it knows about the visitor to recommend the best content on your website to get that visitor to your high-value conversion pages. Since the AI learns from a set of accountbased insights including firmographic, behavioral and intent, it can begin to serve curated recommendations almost immediately. There are three main considerations when implementing Site Optimization, which are:

- Where on the site do you want these recommendations to exist?
- How do you want these recommendations to appear?
- What is the goal of the recommendations?

These three considerations span both strategy as well as implementation. Choosing where these recommendations live on your site addresses both. Do you want to show recommendations to all visitors or only high value visitors; say from a target account? And do you want to have recommendations everywhere on the site or only in certain high value areas where you're trying to drive deeper engagement? Knowing your goals for use will help clarify where the recommendations should live.



The screenshot displays the Site Optimization configuration interface. At the top, there are two radio button options: "Show it on all my pages" (unselected) and "Only on custom pages" (selected). Below the selected option is a sub-label: "(Customize which pages you would like to include/exclude)". The main configuration area consists of a table with two columns: "Condition" and "URL". Each row represents a specific targeting rule, and each row has a green toggle switch on the right.

Condition	URL	Toggle
contains	/sem-take-a-closer-look-at-demandbase/	On
doesn't contain	applink	On
doesn't contain	/event/	On
doesn't contain	/webinar/	On

Image 9. Site Optimization



After you know where the recommendations will live on your website, next you'll have to decide how they will appear. Site Optimization gives you several out of the box implementation options – bottom bar, fly over, list view, or right rail – which have the ability to customize the feel to match your website's design. Looking at the pages where you want the recommendations to live, you may decide on one option versus the other based upon how it affects the page experience.

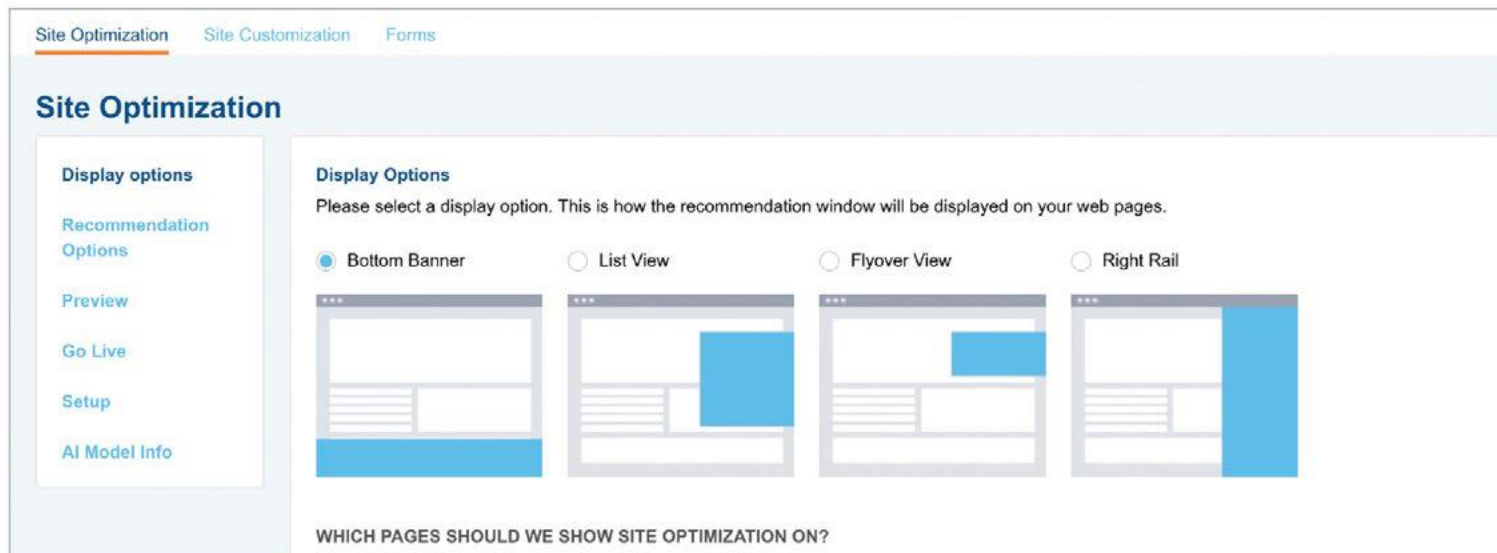


Image 10. Implementation options

Lastly, you'll want to provide Site Optimization with some high-value pages which you believe are the final conversion point for the engaged visitor. Typically these are demo request, free trial, contact request or other high-value content pages.

Knowing that we want the accounts receiving direct mail to visit a specific page on the website, we list that page as a high-value conversion page. Now, whenever a visitor from those companies shows up on our website, the recommendation engine is surfacing content which would lead them to our desired website page, regardless of how they arrived on our site.

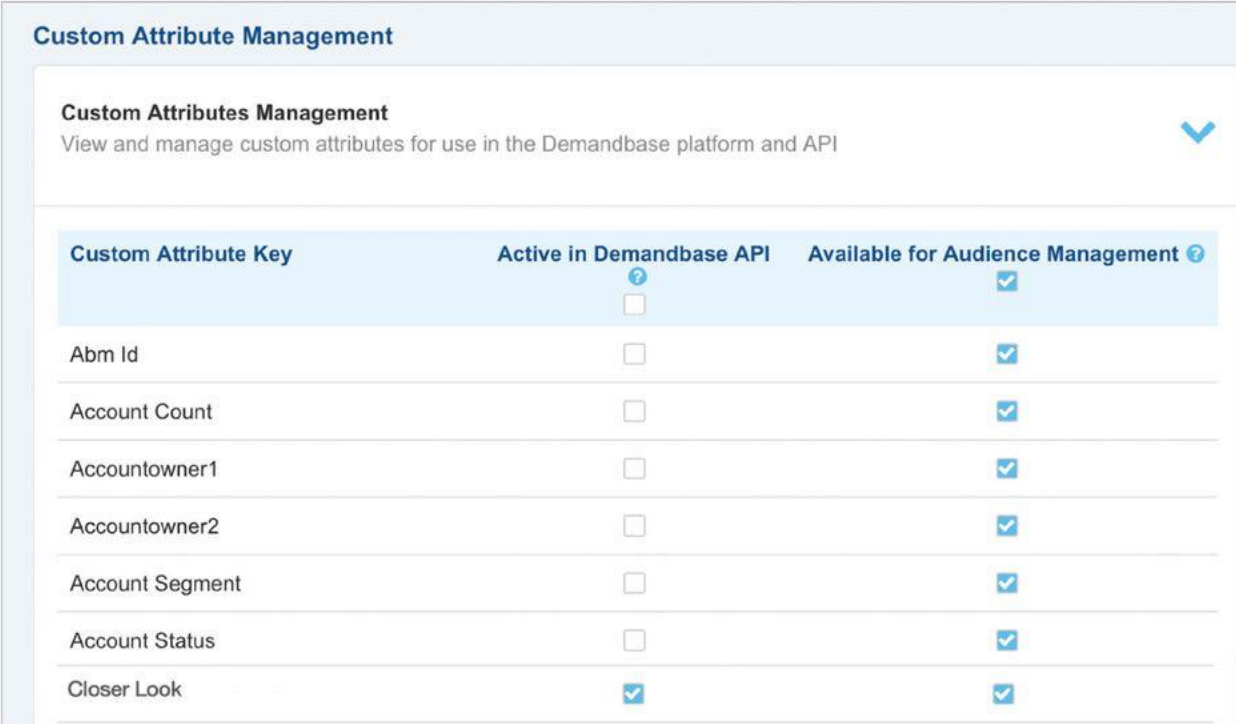
The screenshot displays the 'Site Optimization' configuration page. At the top, there are navigation tabs for 'Site Optimization', 'Site Customization', and 'Forms'. The main heading is 'Site Optimization'. On the left, a sidebar contains links for 'Display options', 'Recommendation Options', 'Preview', 'Go Live', 'Setup', and 'AI Model Info'. The main content area is titled 'Recommendation Options' and includes the instruction: 'These are the high value goal pages you would like your accounts to visit.' Below this, there is a table with two columns: 'Condition' and 'URL'. Each row represents a high-value page configuration, with a small 'x' icon to the right of each URL field for removal. The rows are: 1) Condition: 'contains', URL: 'ebook'; 2) Condition: 'contains', URL: 'webinar'; 3) Condition: 'exactly matches', URL: 'https://www.demandbase.com/sem-take-a-closer-look-at-demandbase/'; 4) Condition: 'exactly matches', URL: 'solution'. At the bottom of the table, there is a '+ Include URL' link.

Condition	URL
contains	ebook
contains	webinar
exactly matches	https://www.demandbase.com/sem-take-a-closer-look-at-demandbase/
exactly matches	solution

Image 11. High value pages

## How To Implement Personalization On The Website With Site Customization

Since we have our Account Watch set up, implementing personalization for these accounts on our website is relatively easy. In the Engagement section of the ABM Platform, under Site Customization, we set up an experience based upon the Custom Attribute which flags an account as part of the direct mail campaign and showcases the hero banner with the same visual imagery at the direct mail and the display ads.



**Custom Attribute Management**

**Custom Attributes Management**  
View and manage custom attributes for use in the Demandbase platform and API

Custom Attribute Key	Active in Demandbase API	Available for Audience Management
	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Abm Id	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Account Count	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Accountowner1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Accountowner2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Account Segment	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Account Status	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Closer Look	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Image 12. Custom attribute management

Using the interface, you can choose which elements to customize and make edits directly to the page's code - either in HTML or as a text editor for HTML.

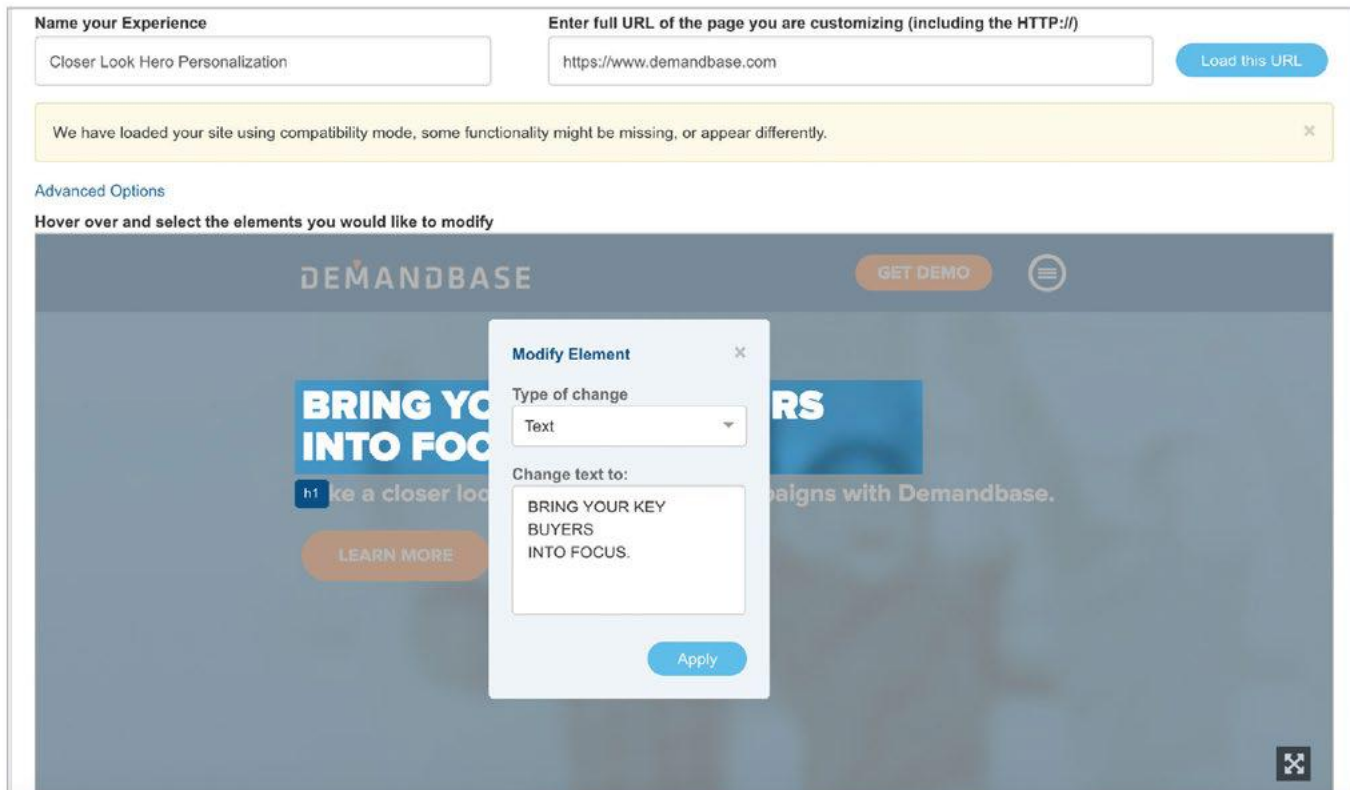


Image 13. Creative asset

Seeing is believing. With so much information on website engagement strategies and how we're using it all, let's take a look at the various aspects and creative assets described above in the real world. Below you'll see the creative assets showing how the visual imagery and messaging are tied together across digital display, a physical direct mailer, the website and finally funnel performance performance on the ABM Platform with ABM Analytics.



Image 14. Direct Mail Piece

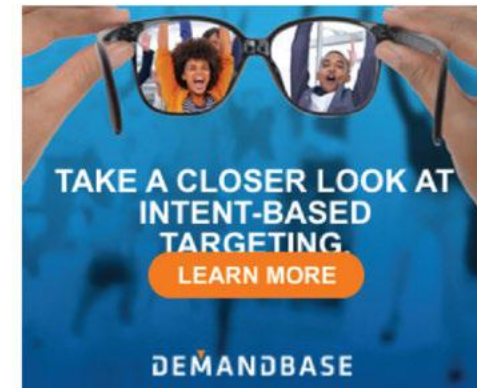
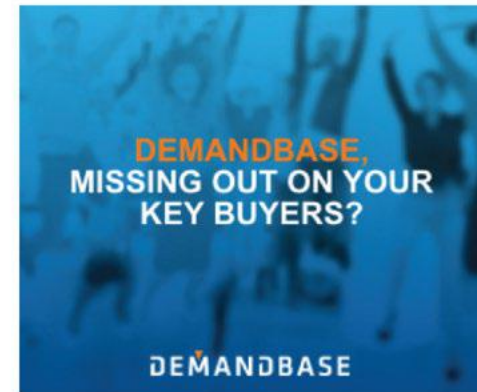


Image 14. Personalized Display Ads

# BRING YOUR KEY BUYERS INTO FOCUS

Take a closer look at AI-powered ad campaigns with Demandbase.

REQUEST A DEMO



## AI-POWERED TARGETING: BUCKLE UP

Pinpoint your key buyers with AI. We monitor 150 billion B2B intent signals and use AI to identify the most relevant buyers from your target accounts.

- Achieve unparalleled precision and scale.



### Recommendations for you

Navigation bar with a left arrow, a profile picture, 'Company >', a smartphone icon, 'Homepage >', a 'ACCOUNT BASE' graphic, 'High Performance ABM: Webinar Series >', and a right arrow.

Image 16. Personalized Web Page for Accounts Receiving the Direct Mail



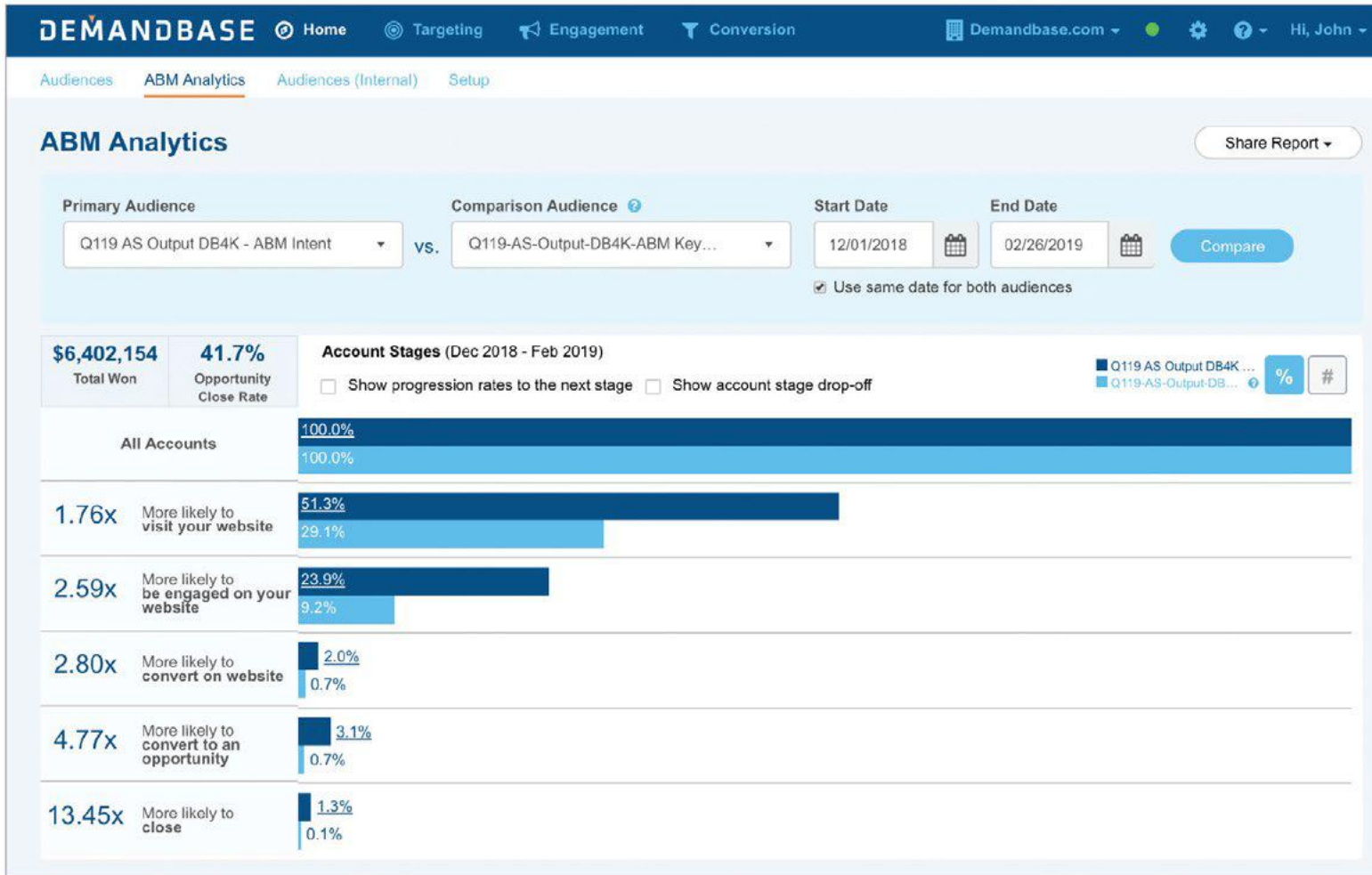


Image 17. Funnel Performance for Accounts Selected for Closer Look Campaign compare to other target accounts

## **READY? LET'S GO!**

Now that you know how to think about driving engagement, it's time to dive into the Demandbase Engagement Solution to make it work for you. Use this playbook to define your audience segmentation strategy and plan your approach to personalization. Don't try to boil the ocean. Start with one or two audience segments (industry or company size) and a home page personalization experience. When you're ready, expand to more advanced segmentation and personalization strategies. Create baselines and measure often, but don't panic if you don't see desired results right away. ABM is an iterative process so test and learn to see what works.

**For additional guidance, visit the [Demandbase Success Center](#) where you will find a wealth of information.**

## **THANK YOU!**





## DEMANDBASE

Demandbase is a leader in Account-Based Marketing (ABM). The company offers the only Artificial Intelligence-enabled, comprehensive ABM platform that spans Advertising, Marketing, Sales and Analytics. Enterprise leaders and high-growth companies such as Accenture, Adobe, DocuSign, GE, Salesforce and others use Demandbase to drive their ABM strategy and maximize their marketing performance. The company was named a Gartner Cool Vendor for Tech Go-To Market in 2016. For more information, please visit [www.demandbase.com](http://www.demandbase.com) or follow the company on Twitter [@Demandbase](https://twitter.com/Demandbase).