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The Definitive Guide to Account-Based Marketing

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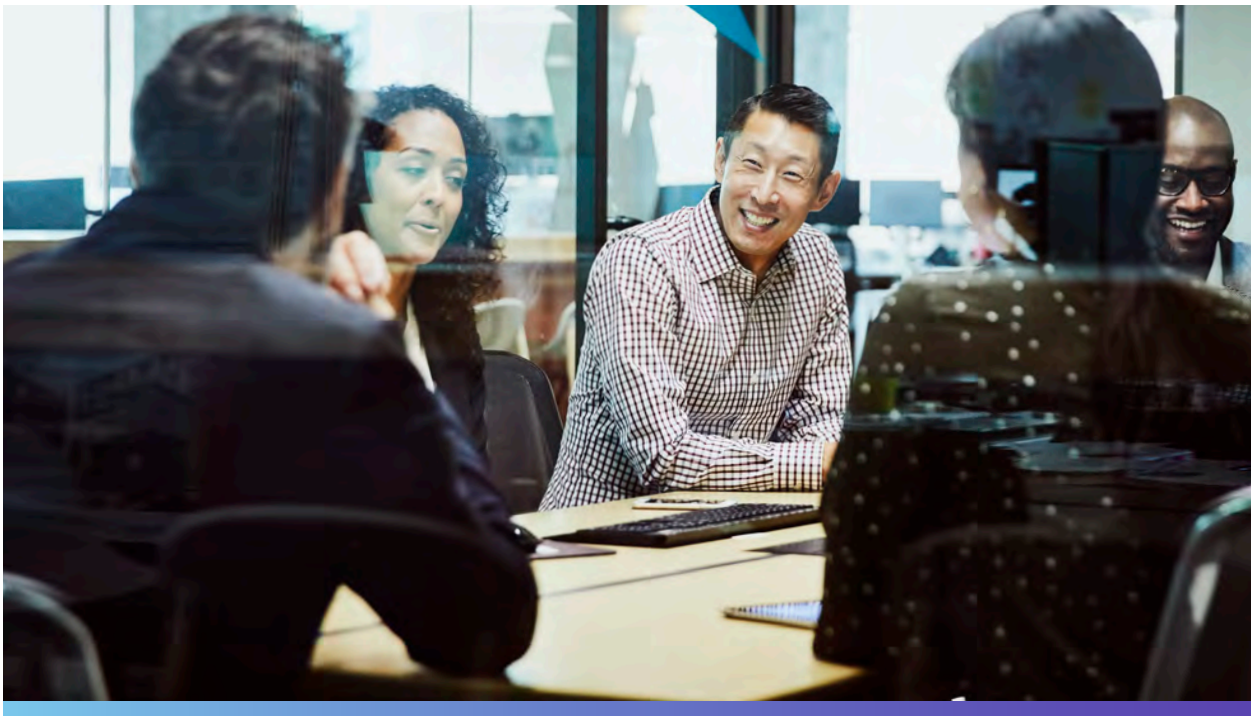
It's an exciting time for marketers. In the era of digital transformation—where everyone and everything is connected—new channels, strategies, and technologies are empowering us to engage our buyers like never before. But these new opportunities also bring new challenges. In today's world, our lives, and our buyers' lives are heavily influenced by digital experiences. Consumers and businesses rely on digital communication. To maximize communication with potential buyers, brands must compete by offering a memorable, consistently relevant experience.

As a result, many marketers are turning to a customer experience-first, account-focused strategy: account-based marketing (ABM).

Organizations looking to keep up with buyers and stay competitive in the B2B landscape must shift from a lead-centric mentality to an account-centric mentality by acquiring, retaining, and nurturing high-value accounts. ABM requires a close partnership between marketing and sales (and other internal teams). Such collaboration helps you close more deals faster and boost return on investment (ROI), all while supporting C-suite priorities as well as your organization's strategic goals.

ABM is indispensable to compete in today's B2B world, and it's here to stay. Why? Because it works. Why does it work? Because more targeted, personalized, and better-orchestrated buyer engagement always works.



So, what changes have brought ABM into the spotlight?

1 First, in the last few decades, marketing has evolved to play a major role in revenue creation, alongside sales. Shared focus and language have paved the way to a higher level of marketing and sales partnership and the go-to-market orchestration that's needed for ABM success.

2 Second, the technology for ABM is now becoming mainstream. From artificial intelligence (AI)-assisted account selection and account-based channel execution to multi-touch revenue attribution, more pieces of the ABM tech puzzle are now available natively in leading marketing automation solutions. This is good news for marketing and sales teams who go to market using a mix of inbound and outbound tactics and a mix of account-based and lead-based strategies to address different buyer segments—which is the case for most B2B companies.

3 Third, but by no means last, personalization of content and engagement channels is no longer a nice-to-have. Buyers expect it. They demand it. In fact, customer experience is quickly rising to be the competitive differentiator in many industries. Regardless of strategy—ABM or otherwise—people and their experiences need to be the focal point. Of course, some of the accounts these people work for have more potential value than others, and it makes sense to apply more effort and investment (and, thus, more personalization, more program dollars, and more high-touch engagement) to top accounts. The great news is that marketers are already leveraging marketing automation to build buyer profiles and, from them, drive personalized engagement at scale. ABM lets marketing (and sales) show that incremental investment in even greater personalization delivers amazing ROI.

In this guide, we'll explore what ABM really means, walk you through how to create a winning ABM strategy, and show you how to choose the right ABM technology to help your organization grow while providing your buyers with an unforgettable customer experience.

What is account-based marketing and why is it important?

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What is ABM?

Account-based marketing (ABM) is a strategy, not a technology. It's a customer experience-centric approach that requires sales and marketing teams to collaborate on best-fit account opportunities and engage specific buying groups inside target accounts with relevant experiences to generate more revenue faster and easier than before. Rather than marketing broadly to many potential buyers, companies that employ an ABM strategy focus their resources on a shared set of specific accounts that they know are a good fit for the products and services they sell, and orchestrate a coordinated and personalized account-based experience for key stakeholders, or buying groups, within each account.

Successful ABM requires sales and marketing teams to shift their mindsets:

"Who's interested in my products?" → "Whom should we sell to?"

MARKETERS SHOULD SHIFT FROM:

Lead-centric approach → Account-based approach
Reactive engagement → Proactive engagement
Random individuals → Specific personas & buying groups

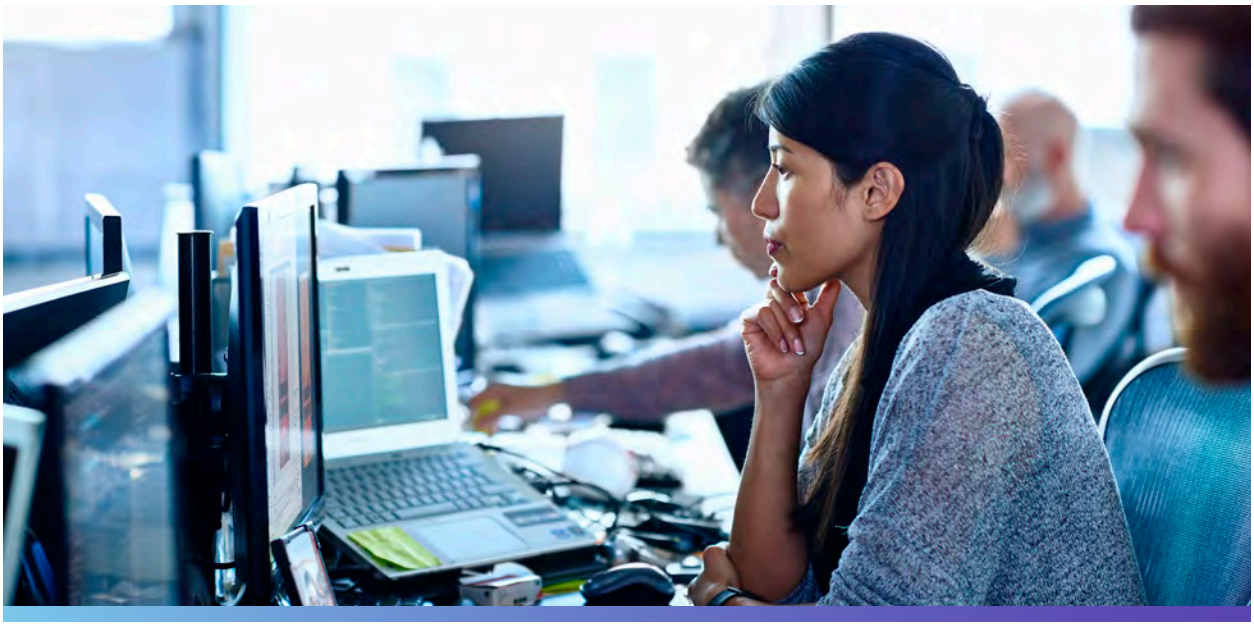
SALES SHOULD SHIFT FROM:

Relying on manual process → Trusting technology and automation
Sales-only data → Combined sales and marketing data
Working independently → Collaborating with marketing

The objective of ABM is to move an entire buying group toward a specific goal—whether that's nurturing them toward an initial sale, cross-sell, or upsell; renewal of contract; or even advocacy. In this guide, we'll focus on the strategies, techniques, and best practices that can be applied by B2B brands of all sizes and marketing maturity.

Why is ABM important?

As a marketer, you're always looking for new ways to drive revenue for your organization. Traditionally, B2B marketing teams have largely subscribed to a lead-based inbound marketing model. This includes driving awareness and engaging the largest number of potential individual leads through content marketing and other digital marketing techniques, then nurturing those leads and guiding them down the funnel toward sales. The problem that has been overlooked is that all of this is done without an account strategy in mind.



As marketers have become proficient in digital marketing at scale, and analytics capabilities have improved, it's become clear that not all generated leads are the best fit. As a result, marketers are wasting time, budget, and resources on the wrong opportunities. This has created the need for more targeted techniques and technologies.

While ABM is not a new concept, it's quickly becoming table stakes for B2B brands of all sizes due to recent technological innovations and is becoming the new foundation for all B2B sales and marketing efforts. The goal is not to eliminate lead-based efforts, but rather to find the right mix of lead- and account-based strategies that fit best with your organization and maximize results. In fact, 97% of marketers achieved a higher ROI by incorporating ABM than with any other marketing initiative, according to Alterra Group.

What are the benefits of ABM?

Both traditional demand generation and account-based marketing strategies have their benefits, and organizations need to find the right mix of both to maximize their revenue potential. By adding elements of ABM to your revenue strategy and using it to augment and improve your lead-based efforts, you can generate more revenue faster and more efficiently than before. That's because the accounts you target with ABM are strategic—they're often high-yield and a better fit for your products or solutions. As a result, these accounts naturally have a higher likelihood of generating more revenue and can help you penetrate new markets and verticals. ABM also helps justify engagement and resource allocation using data instead of gut feelings and opinions. ABM can also be effective for consumer audiences, specifically B2C-considered purchase scenarios that involve a high level of investment and time from the buyer.

Benefits of ABM

Account-based marketing offers real benefits to organizations. Let's look at some of the key benefits and their impact.

It boosts overall sales and marketing ROI

According to the 2018 Account-Based Marketing: The Complete Business Requirements Guide, 93% of B2B marketers worldwide consider ABM extremely or very important to their overall marketing efforts.

It is more efficient and targeted

By deciding on which accounts to target, you can profoundly impact the way you think about sales and marketing and the types of programs you execute, along with the shared resource gaps that you need to fill. Instead of casting a wide net, you can look for ways to target key individuals in specific organizations. By strategically targeting your efforts, you minimize the expenditure of resources on less important buyers or market segments. And because ABM requires organizational buy-in from the beginning, everyone works toward achieving the same goals.

It is more personal

ABM redirects your sales and marketing efforts to a targeted audience with laser precision, and it also entails coordinating and personalizing your messaging and communications to specific personas and buying groups within each target account. According to the 2017 State of Engagement Report by Marketo, 66% of B2B consumers expect all of their interactions with brands or vendors to be personalized. Buyers are more likely to engage with content that is specifically for them and is relevant to their business and stage in the buyer journey. Because ABM is inherently personal, your campaigns are already optimized for the right audience.

It helps drive attributed revenue

With strategic ABM, you take an account-centric view of measurement, which makes it easier to show your impact on the accounts that matter most. You'll understand the true impact each activity across channels has on driving the sale. And because of close collaboration between sales and marketing, each team can understand exactly which channels, campaigns, and messages made an impact.

It increases sales, marketing, and organizational alignment

ABM marketers must also work closely with sales to identify target accounts and pursue them throughout the sales process, with the strategic goal of landing and expanding those accounts. This collaboration holds each team accountable for working toward the same goal and ultimately creates a positive culture shift within your organization if done successfully.

B2B marketers who successfully launch and sustain formal ABM programs can improve their firms' revenue growth and profit margins, strengthen connections between marketing and sales colleagues, and enhance interactions with customers and prospects. Success requires new working relationships between marketing and sales.

It improves the buyer experience

By using a robust ABM solution to automate the delivery of relevant, personalized messages across all channels, the buyer experience is improved compared to using point solutions for one-off campaigns. Each persona receives content that matters to them at the stage they are at, which builds trust and loyalty over time.

"B2B marketers who successfully launch and sustain formal ABM programs can improve their firms' revenue growth and profit margins, strengthen connections between marketing and sales colleagues, and enhance interactions with customers and prospects. Success requires new working relationships between marketing and sales."

- Account-Based Marketing Brings Marketing And Sales Into The Same Orbit, Forrester, 2016

ABM is for companies of all sizes

Traditionally, ABM strategies were reserved for large organizations with big budgets and teams—and implementing them could be a tedious, manual, sales-driven process because of the personalization required.

ABM today is less about your company size and more about your business model and goals. Thanks to emerging technologies, businesses of all sizes can successfully implement ABM—and smaller companies are able to run highly personalized ABM campaigns at scale to help build awareness and credibility.

> *"ABM isn't about company size. If there is more than one person in the organization you need to influence to get the deal, ABM applies."*
>
> **- Matt Heinz, President and CEO, Heinz Marketing**

There are typically four main business goals, or use cases, for ABM:

1. **Improve collaboration with sales:** When you need more connected tools to simply work better with sales and close more opportunities faster for any of your existing shared go-to-market strategies

2. **Cross-sell/upsell existing buyer accounts:** When you want to close opportunities with existing buyer accounts by selling new/additional products to existing/new buying groups

3. **Acquire new logos:** When you want to close opportunities with net new/known target accounts by selling new/core products to first-time buyers inside your existing vertical or market

4. **Break into a new market/vertical:** When you're looking to close opportunities with net new/known target accounts by selling new/core products to first-time buyers inside a new market or vertical

Worksheet

Is ABM right for your organization?

Although organizations of all sizes can implement ABM, it's important to determine whether it's right for your business model before you decide to make the move to an account-centric approach.

Here's a checklist that can help you evaluate whether your organization should implement ABM:

- ☐ Your sales cycle involves a research/evaluation phase due to the cost or level of commitment required from the buyer, and it often involves multiple stakeholders.
- ☐ Your sales and marketing team wants to make a bigger impact with a more strategic focus.
- ☐ Your existing buyers who generate the most revenue have distinct characteristics, or you have identified accounts with distinct characteristics that have the potential to generate more revenue.
- ☐ There are organizations with needs that your solution clearly addresses.
- ☐ Your organization's goals include expanding into a new segment, territory, or vertical, or going after your competitor's customers.
- ☐ Your organization offers several products or services and has set goals to grow buyer lifetime value through upsell and cross-sell.

Create a winning ABM strategy

If you're considering implementing ABM or you want to take your program to the next level, you should refer to the following pillars to help structure your strategy. We'll cover these in much more detail in the subsequent chapters.

The 3 Cs of account-based experiences

Successful account-based experiences are made up of three core principles:

1 **Collaboration:** The ability needed for cross-functional teams to collaborate on specific accounts while maintaining full visibility into all team activity (especially sales and marketing). Collaboration ensures that each team knows the current state of the customer's relationship and can adapt accordingly. For example, if account A already saw email messaging from marketing, then a sales rep can take that context into account when calling upon that account. Or, marketing can adjust messaging on the web or in an email if contacts from a specific account have already had an introductory call with a sales rep.

2 **Coordination:** The ability for sales and marketing to coordinate seamless, personalized account-based experiences that extend across multiple channels. Coordination ensures that your prospects and buyers have a consistently relevant experience every time they interact with your brand. This requires sales and marketing tag teaming the brand interactions and working in harmony to make sure that each marketing and sales engagement channel is working together—that is, picking up where the last channel left off so that the buyer feels known and appreciated with a custom-tailored account-based experience (ABX), no matter what type of sales or marketing activity is taking place. This includes online and offline interactions.

3 **Continuity:** The ability to create and maintain continuous ABXs that start with awareness and span across advocacy and beyond for both prospects and existing buyers. Continuity ensures that your brand experience never stops for your buyers. Account-based experiences should never stop—always adapting to the latest state of the buyer's relationship with your brand. When done successfully, ABX will turn a prospect into an advocate.

Map your strategy

An ABM strategy focuses on target accounts, but to successfully market and sell to those accounts, you must engage a variety of activities.

These ABM strategy pillars will help you drive success across all your activities, though they will vary depending on your objectives and the use cases mentioned previously (new accounts, upsell, cross-sell, etc.).

PILLAR	DESCRIPTION
Confirm business goals	The very first requirement for ABM is to identify goals for adding new business and growing existing business. The goals will help dictate which ABM strategy is necessary to align on.
Create your ABM strategy with experience at the center	Develop an ABM strategy with sales that has ABX at the center of it. Create a plan that coordinates continuous ABXs to focus on the long-term lifetime value of each account instead of one-off, random acts of sales and marketing.
Profitability	Create your team of stakeholders across the organization and get buy-in on an account-based strategy. This includes aligning sales and marketing around the business goals, objectives, strategy, and metrics mentioned above in the first step.
Get buy-in across the organization	Organizational alignment between marketing and sales is required for ABM success. Get the two teams in sync by briefing sales on the benefits of an account-based strategy, agreeing on the definition of a qualified lead, and setting shared goals and engagement metrics that help keep both teams accountable.
Partner with sales	Organizational alignment between marketing and sales is required for ABM success. Get the two teams in sync by briefing sales on the benefits of an account-based strategy, agreeing on the definition of a qualified lead, and setting shared goals and engagement metrics that help keep both teams accountable.
Identify personas	Define personas and their needs for roles such as influencer, practitioner, decision maker, IT guru, and budget owner.

PILLAR	DESCRIPTION
Choose your accounts	Look for an ABM solution that uses AI to prioritize and select accounts faster and better by using fit and intent data, resulting in more revenue.
Define your total addressable market (TAM)	Match your ideal customer profile against businesses to see how big your total addressable market is, and to see what the overall revenue potential is, assuming you can close a certain percentage of the accounts.
Create the right content	Content is the most critical element for any campaign, especially when you're targeting multiple different personas and buying groups inside specific verticals and industries. Successful ABM content is personalized, relevant, and timely. See page 42 for tricks for developing engaging content at scale.
Engage across channels	Different contacts and buying groups within target accounts don't consume information on one channel. Make sure you have a solid cross-channel strategy for listening to and engaging your accounts.
Measure, analyze, and optimize	Any good strategy starts with goals and the ability to demonstrate movement toward those goals. Make sure you start measuring ABM success via holistic account engagement instead of individual lead activity. Establish the right account-level engagement metrics and check-ins so you can iterate on your ABM strategy and show the momentum, progress, and account penetration you're driving.
Select the right ABM solution	For organizations that want to effectively implement, track, and measure the previous pillars, technology is a must-have. Choose technology that puts account-based experiences at the center of your ABM strategy and your larger organizational goals.

Confirm your business goals

Many companies struggle to understand how to create their ABM strategy because every team within an organization is focused on its own team goals. But it's not necessary to start from scratch. If the goals and needs of your business drive your ABM strategy, it is more likely to get approved by executive stakeholders.

What are your business goals for this year?

The very first step is to educate your team about your business goals for the year ahead. These goals generally come from your executive leadership and have been aligned with the board already. In most cases, there is a strong focus on generating new revenue from new business or generating incremental revenue from existing buyers, or both.

Your strategy depends on your main revenue goal:

Generate NEW revenue:

- Creating a new product? → ABM strategy that focuses on upselling existing customer accounts
- Trying to penetrate a new market or vertical? → ABM strategy that focuses on targeting new accounts and logos that are similar to existing high-value accounts

Generate INCREMENTAL revenue:

- Trying to penetrate a new user type or buying group within existing customer accounts? → ABM strategy that focuses on cross-selling existing high-value, best-fit customer accounts
- Enhancing an existing product to increase adoption and renewal rate? → ABM strategy that focuses on adoption

What is your total addressable market (TAM)?

After your team is clear on your business goals, it's time to size up the market that you are going after. There are many ways to figure out what your TAM is going to be. It starts with the value that your product offers mixed with the vertical and market that your ideal customer profile applies to. For example, is your offering for enterprise, commercial, or small business? Is it a self-service product, or does it require services? Is it most valuable for retail and auto verticals?

Once you understand the market that you play in, you begin to see how many accounts exist within each market that are a good fit for your product. Your TAM will dictate the market and ultimately the number of accounts that you want to target, giving you tiered lists of accounts to go after, along with high-level deal size and revenue forecasting.

Which personas and buying groups are you targeting?

Once you've aligned on business goals and the market and accounts you want to target, it's time to confirm the buying group that you want to market and sell to. This is important because it shows what their specific needs are, so you can personalize your individual account-based experiences for each persona by linking the value of your products/services to their needs.

This involves identifying key individuals for each account who will be part of the decision-making process and who ultimately all need to agree to purchase your product. The best place to start is confirming the department/team that benefits from your product. For example, is your product used by IT, marketing, or sales?

After identifying the team/department, confirm the people involved. For example, start by identifying:

- **Influencer/practitioner:** This is normally the actual user who is in the weeds with your product. They typically care about efficiency, which translates into ease-of-use, convenience, intuitive workflows—all the things that make their jobs easier, faster, better. Focus on messaging about how your product is easy to use, with intuitive designs and efficient workflows, resulting in the quickest time to value.
- **Decision maker:** This is typically the manager of the influencer/practitioner. They're going to care about the well-being of the practitioner, but they also care about ROI. They focus on the end result—that is, if I pay $30K a year for this product, I expect to cover that cost in revenue 3x in a year. Show them case studies with proven results for similar businesses in similar verticals with similar needs/challenges.
- **IT guru:** This is normally an IT person in charge of making sure that your product naturally and seamlessly integrates with their existing tech stack. Your messaging should focus on these product attributes: well-developed code, integrated data models, and robust software integrations that play nice with everyone, don't disrupt the current tech stack and data infrastructure, and do not take a long time to set up.
- **The no-no:** This can either be an influencer or decision maker who has used a competitive solution in the past at a previous job and wants to advocate for the competitor. They will care mostly about what differentiates your product and how it is a better fit than other products they have used, or have been told to use. Tell them about the competitive advantages of your product versus other tools.

The final step is to confirm the needs of each persona, and ultimately how your product will help each one. This will then inform your personalization and engagement strategy for messaging and content. For example, if the decision maker cares most about quick, easy, and accurate reporting, then your messaging on the website, emails, and events should all include that messaging along with the advantages that your product offers from a reporting standpoint.

Get buy-in across the organization

Although ABM includes “marketing” in its name, it requires input from and collaboration with stakeholders outside of marketing. Share your ABM plans with other relevant teams, such as sales, services, and support. These teams need to be aware of how you plan to engage target accounts and how their roles come into play.

Define your dedicated ABM team

If you haven't already, put together a core team responsible for developing, tracking, and measuring your ABM strategy. If possible, make sure that your ABM team is 100% dedicated to ABM. This will help maximize the full potential of your ABM strategy moving forward.

Here are some examples of whom you may want to include:

- **Executive sponsor:** Acts as a champion for your ABM strategy, offering support and strategic guidance
- **Marketer:** Drives the ABM strategy from creation to execution and functions as the point person to ensure cross-functional collaboration and to report on ABM success
- **Marketing operations/sales operations:** Works to examine your existing database, identify trends, and report on progress. Critical to choosing accounts
- **Account executive leader:** Helps align the strategy around buyers and their needs, creates ABM service-level agreements (SLAs) and leads, and educates the team on best practices
- **Sales development leader:** Guides research on accounts, providing feedback to the group to recalibrate, if necessary
- **Services leader:** Looks for opportunities to support current buyers and potentially identifies new opportunities for upsell and cross-sell
- **Support leader:** Strategically monitors target accounts to help ensure buyer retention and prioritization

Beyond that, you should define the roles different teams will have as part of your ABM strategy and consider choosing representatives to help you disseminate best practices and training. Other teams you may want to include are:

- **Solutions consulting:** Delivers information to the buyer during the sales process. Often a point of contact with key decision makers.
- **Product marketing:** Develops your messaging, position, and go-to-market strategy for your target accounts. Shares the product road map and its relevance to the target accounts. Helps provide collateral and sales training for products when closing target accounts.
- **Vertical/industry marketing:** Provides industry or product expertise as it relates to target accounts. Helps provide a more targeted message and experience to the accounts.
- **Corporate marketing:** Helps craft a targeted set of messages that are specifically relevant for target accounts.
- **Content marketing:** Understands what content exists to support your ABM strategy and creates or repurposes content to deliver personalized experiences.
- **Design:** Integrates creative design elements into campaigns to help inspire the target accounts to engage.

Partnering with sales

Partnering with sales is a prerequisite for an effective ABM strategy. If you're considering implementing ABM or looking to improve your current strategy, start by ensuring you have a strong foundation of organizational alignment between your marketing and sales teams. Before you get started, make sure your teams are in harmony and are practicing these partnership basics.

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Increase departmental alignment

Account-based marketing doesn't just involve marketing

If you need to gain sales buy-in, make sure the sales team understands the dramatic benefits that ABM brings to their lives: higher win rates, larger deal sizes, and increased velocity, to name a few.

ABM helps the sales team

Most sales reps will take the opportunity to provide honest feedback. Sales organizations are often frustrated by what they feel are unqualified leads and by not being able to find enough opportunities that will close. Additionally, the sales hand-off may cause visibility issues between both teams, making it hard for sales to know which accounts have already had interactions with marketing activities. Those are all reasons that sales should be excited about an account-based strategy.

How would your sales team like to speak with only highly qualified, ready-to-buy accounts? The best ABM solutions use fit, intent, and engagement data along with AI to quickly profile and select the best accounts. This means your sales team won't need to spend as much time guessing which accounts to go after, and revenue will increase faster.

Whether you're meeting one-on-one with the director of sales, writing an email, or pitching the entire sales department, ask these key questions:

- How satisfied is sales with the target account leads they're currently getting from marketing?
- Is marketing generating leads in the right accounts?
- Does the sales team have enough accounts to meet their quota and drive closed business?
- How are marketing programs specifically helping the sales team penetrate their target accounts?
- Is the current sales and marketing lead hand-off causing more harm than good?
- Does sales feel like they have enough visibility into marketing activities that have happened to the accounts they are about to reach out to?

While ABM might force sales out of their comfort zones initially (especially if they're used to receiving a high volume of leads) and it might take time before they start seeing new opportunities, most sales reps won't turn down a much higher percentage of qualified opportunities from accounts with a high propensity to buy.

Involve other stakeholders

All stakeholders who impact the buyer experience need to be aware of your ABM strategy. Start by educating them about the purpose and benefits of implementing ABM.

Remember, different benefits will resonate with different stakeholders. For example, your professional services team will want to understand how they can help your buyers get the most out of their investment, whereas your CFO will want to understand why investing in ABM will provide greater ROI than a traditional marketing approach. Be sure to tailor your message based on audience.

> *"Organizations struggle with creating and maintaining internal alignment as they implement their ABM strategy. Misalignment is a problem because it affects every phase of ABM—planning, execution, and measurement. Organizational misalignment is solved by aligning goals and incentives."*
>
> **- Dave Rigotti, Head of Enterprise Demand Generation & ABM for Marketo, an Adobe company**

Agree on definitions

You need to share a vernacular. Without standardized definitions for terms, teams are naturally going to be out of sync. Marketing's understating of what a high-priority account is, needs to match sales' understanding, or there will inevitably be discord between the teams.

Set shared goals

Marketers and sales teams often have different metrics and short-term goals, but implementing ABM can help them see eye-to-eye.

While they share the same long-term goal—driving revenue by converting leads and growing their lifetime value—the process can seem like two stages because of the perceived hand-off from marketing to sales in a typical broad-based marketing funnel, which can cause tension. Encourage your teams to think about the sales funnel as one process, not two, and to do so sooner. Marketing should bring sales into the marketing process sooner, while sales should extend marketing's involvement through the entire outbound account qualification process. For ABM, like broad-based marketing, agreeing on the definitions and hand-offs between stages is a crucial foundation.

Compensation

To achieve a common view of the sales funnel, structure compensation similarly for sales and marketing. For instance, commission for marketing can be tied to target account opportunities created, pipeline generated, and revenue won. This builds trust between the two departments because both teams have a stake in improving target account performance. Marketers gain a better understanding of the impact of account selection, and sales teams understand the importance of timely and frequent follow-ups.

Joint activities

Marketers often feel disconnected from what sales reps do, so incorporating the marketing team into regular sales activities can engage them in the sales process and create two-way visibility across teams—and including marketing on forecast calls can help make marketing and sales feel accountable for the same goals. Also, you can set up regular meetings with sales to review activity within target accounts and marketing programs, so both teams are on the same page.

Give sales full account visibility

There can be friction within sales due to limited visibility into leads and low lead pipeline. Typically, sales development reps (SDRs) research each account to build a list of contacts within them and reach out to establish a relationship. They continually nurture that relationship until the prospect is sales-ready and willing to meet. Then, the lead gets handed to account executives (AEs), who further evaluate the account to understand pain points, demo the product/service, and negotiate the contract terms.

Build a fair routing engine

With account-based marketing, SDRs and AEs work together to produce high-quality leads within target accounts. Tensions may arise because sales might receive fewer leads—though the leads are typically more valuable. To address these issues, it's a good idea to enable visibility and implement guardrails at the account level, so you can route inbound and outbound lead activities to the SDRs and/or AEs.

SDRs are under pressure to deliver on the accounts that get assigned to them, so they might not feel like they're getting an equal number of leads. Sales coverage and performance results should reflect varying demand.

Account scoring

To ensure that your organization is aligned, sales and marketing should agree upon scoring—ranking leads and accounts for their fit and sales-readiness.

Scoring accounts to pursue is the first critical piece, as it can help you determine which accounts meet your criteria and help you prioritize your resources correctly.

Once you have chosen accounts and are delivering targeted marketing, you should score target accounts (at the account level) and lead activity (at the contact level) by tracking marketing qualified accounts (MQAs) instead of traditional marketing qualified leads (MQLs).

Using predictive analytics, you can determine the right account score threshold and weighting based on different data, including firmographic (revenue, employee size, industry, location), technology fit, intent data from across the web, and 4K signals (hiring trends, funding, social media activity). For prospects to be classified as MQAs and passed to sales, they must be a good fit and engage with you, and work at a company that matches your ideal customer profile.

This will help you prioritize accounts and contacts appropriately, and your marketing and sales teams should work together to determine account score thresholds.

Qualifying accounts

If your organization has a lot of target accounts, sales may get overwhelmed with the high lead volume. This will require a different strategy. Leverage predictive scoring to prioritize lead follow-up based on a target account's fit, recent meaningful activities, activity type, and engagement. To do this at scale, you may want to revise and upgrade your lead scoring to an account-scoring model.

An account score groups the individuals involved in the buying process and provides an aggregate view of readiness to buy. If your buying groups are large, it can be helpful to use sophisticated lead and account scoring to weight each persona differently, so that the aggregated account score shows different levels of influence and importance for certain contacts. You can use a sum, an average, or even a weighted average of individual scores. This supports your sales team's efforts to target a set of accounts and focus on the ones most likely to convert.

Effective account scoring must determine which individuals belong in the same account. You can group by accounts in your customer relationship management (CRM) system or use a sophisticated marketing product to infer connections based on IP addresses and company names.

	Top 100	Tier 1	Tier 2
Selection criteria	**Strategic accounts** selected by sales	**Existing accounts** in CRM with account score = 100	**"Look-alike" accounts** with account score = 100 that are purchased

Consider an ABM solution that uses AI and allows you to create multiple tiers of target account lists.

Structure your organization for alignment

Creating the right structure within both marketing and sales is imperative for proper alignment. This means defining roles in marketing and sales in a way that helps you engage and close your target accounts more effectively.

Marketing roles to define:

- **Demand generation:** Supports revenue goals by generating more qualified leads to pass to the sales team and focuses on things like full-funnel marketing programs, lead nurturing, and analytics
- **Content marketing:** Creates valuable and educational content to attract, inform, and engage an audience throughout the sales cycle
- **Product marketing:** Responsible for messaging, positioning, deal support, and sales enablement
- **Customer marketing:** Supports sales through customer advocacy, testimonials, and references
- **Marketing operations:** Monitors SLAs, scoring, and database cleanliness for the entire organization, allowing marketing and sales to have accurate data that helps the company deliver the right message at the right time

Sales roles to define:

- **Sales development representatives (SDRs):** Help bridge the gap between sales and marketing, and focus on reviewing, contacting, and qualifying inquiries and delivering sales-ready accounts to account executives.
- **Account executives (AEs):** AEs exist to close sales. It's more cost-effective to have your top sales reps talk to the most qualified leads and work on accounts that have been qualified by SDRs. You don't want your best closers wasting their time on leads that have no possibility of converting.
- **Sales operations:** Sales ops is responsible for sales commission plans, territory management, participating in account selection, sales administration, deal support, systems and data management, and more. This team is critical to supporting the sales team's success.

Create SLAs

SLAs began as parts of service contracts that formally define aspects of the service, such as scope and time. At Marketo, we adopted SLAs to build alignment and make our marketing-to-sales lead hand-offs more effective. SLAs also contribute to another critical part of sales and marketing partnership—making sure no qualified lead is left behind. With ABM, that means ensuring that no account is turned over without the proper research, attention, communication, and effort.

SLAs in a broad-based marketing strategy help prioritize and assign a time stamp to leads. For ABM, they are specific to account contacts versus individual leads, and they also specify progress toward defined key performance indicators (KPIs), like account penetration and contact frequency, among others.

Ongoing collaboration

Once you have your sales and marketing alignment basics down and have started applying them to ABM, what does an ongoing collaboration between the teams look like?

Plan ongoing communication

While it will vary from team to team, especially if your teams are not in the same physical location, it's critical that the lines of communication between teams stay open. Communication can mean anything from an update email to a quarterly in-person deep-dive session. As a marketer, you may have to actively solicit feedback from sales. Don't just give communication lip service—plan for it.

There are a few types of meetings you may want to plan so you can evaluate your progress and make any necessary changes to your ABM strategy.

- **Weekly updates:** These involve the core ABM team in sales and marketing. Share updates on a program level, brainstorm challenges, and check in.
- **Monthly check-ins:** Attendees should include a larger team and your executive sponsor, if available. Evaluate progress in target account tiers and the ABM program as a whole, share metrics from early indicators to pipeline, and discuss issues, like adherence to SLAs.
- **Quarterly review:** Dive deeply into the business metrics, program successes (what do you stop, start, and continue?), and overall account strategy. This meeting should involve the larger stakeholder group and is an appropriate forum to consider continued investment or expansion of the ABM initiative.

Choose your accounts

Depending on your market, you may be implementing different levels of ABM. Some organizations might focus solely on high-value account tiers, others may only target key verticals, and still others may fold their ABM campaigns into their broad-reaching demand generation strategy. Whatever your objectives are—from acquisition to buyer retention—every ABM strategy requires you to know what your ideal customer profile is and which accounts to select for your target account lists.

Account identification

Selecting target accounts will vary for every company because each organization has unique goals and a personalized strategy that will determine its criteria.

Targeting criteria

Target account identification should only be done with all stakeholders at the table. Here are a few factors you should consider when identifying accounts for your ABM campaign:

- **High yield:** Identify top moneymakers and their characteristics. They are likely to result in larger than average deals for your sales team and generate substantial revenue over the long term.
- **Profitability:** Seek out "look-alike" accounts that match your best buyer profile and search for existing buyers with cross-sell/upsell potential. They are likely to bring the most revenue and have the highest lifetime value.
- **Product fit:** Look for companies with business needs that clearly match your solutions, which increases the likelihood that they will purchase.
- **Quick wins (high deal velocity):** Search for accounts that typically have a short purchase decision process due to their size/structure.
- **Strategic importance:** Target accounts that align with your company's strategy—for instance, if you're entering a new market or territory. Sometimes acquiring new, big logos is a strategic goal.
- **Territory:** Pursue accounts in a specific region of the country to directly support sales, since sales teams are often segmented by territories. Helping salespeople build pipeline in their region will drive higher ROI.
- **Competitors:** Go after companies using competing products. A marketing solution with a strong partner ecosystem can help you identify companies using your competitor's products. If your competitor is doing well with certain types of companies, consider targeting that profile.

To further identify which accounts to target, do some research to help surface potential targets. Here's how to start:

- **Leverage AI:** Leverage an ABM solution that uses AI to learn from massive amounts of data, including fit and intent data, for your existing high-value customer accounts. These solutions will automatically score and rank your target accounts as well as provide propensity scores based on which accounts are the best fit—and are more likely to close faster.
- **Talk to sales:** The sales team has great insight. They may have had conversations with companies that fell through or can give you a better idea of the kinds of accounts to pursue. Sales may suggest their own list of target accounts, so look for overlaps between the two lists. Then, agree on a system of account scoring and score the remaining potential target accounts to see which are most likely to close.
- **Review CRM history:** Look in your CRM system to see which companies fit into the high-yield/quick-win categories. Find commonalities and create a company profile likely to generate large deals, or build a list of names similar to those you already sold to.
- **Discover existing opportunities:** With an ABM solution that's native to your marketing platform, it's easy to find out whether any of the accounts fitting the profile you're focusing on have engaged previously with your brand. Accounts that have already engaged with you may be more receptive to your marketing and show quicker results once you target them with personalized campaigns.

Leverage your data to make informed targeting decisions

Before you get started with ABM, your marketing and sales operations teams need to do some prep work. This prep work will help you make informed choices about account selection and distribution.

First, you will want marketing and sales operations to help you get a clear picture of four things:

1. **Sales data (CRM):** How do you organize and define parent and child account hierarchies in your CRM system? What data do you have there, and what does it tell you about the accounts in your database? Can your sales and marketing operations teams identify trends in your highest value buyers today? Do you have data gaps that you need to amend before you can get a clear view of whom you want to target?

2. **Marketing data (marketing automation and demand generation):** How do you organize your marketing engagement and activity data? What marketing data do you value the most for your business? Do you have lead and account scoring set up, and how will they impact or be used for your ABM programs? How are you sharing marketing activity and engagement data with your sales team? Start thinking about how you can augment your existing lead-based data structure and programs to empower your new ABM efforts.

3. **Sales territories:** How are you currently dividing leads across territories? Before you embark on choosing target accounts, understanding the volume and distribution of your current leads is critical. It's tough to get sales buy-in if a large percentage of the target accounts fall in one or two territories.

4. **Ideal customer profiling:** Do you already know what your ideal customer profile is, and how are you updating it each quarter? Is it backed by data? If you don't know which accounts to target or have already exhausted your initial list, consider working with marketing operations to build a predictive model. Predictive analytics uses AI to first identify what your ideal buyer profile is, based on your existing high-value accounts and their common data attributes, and then uses those attributes along with third-party data to scan a list of accounts and recommend which of those accounts are similar. It takes into account millions of data attributes from both internal and external sources (company's tech stack, hiring trends, social media activities, funding level, marketing solution, CRM, blog posts, third-party websites, social media channels, etc.) and applies machine learning to determine those showing the highest propensity to purchase.

Account selection

Once you feel confident about your ideal customer profile (ICP), use it to select and prioritize the right target accounts. Selecting the right target accounts is one of the most crucial parts of starting ABM because it dictates to whom, when, and where you are going to invest your ABM resources. Successful account selection is driven by the original ABM goals that were agreed on between sales, marketing, the rest of the organization, and your ICP.

Traditionally, account selection is a long, tedious, and manual process that is often done by sales in a vacuum using gut feelings, opinions, and sales-only data from the CRM system. Use the AI-based profile created above to help speed up the process, and make the list more accurate by leveraging additional data and insights faster than any human would be able to process.

In addition to creating your ICP, a predictive marketing analytics tool will use the input data to train AI models and scan a list of accounts to find commonalities, and ultimately, a recommended target account list.

Examples of profiles and predictive target account lists:

ICP	STRATEGY	INPUT DATA (TRAINING DATA)	SCAN DATA	OUTPUT DATA (ACCOUNT LIST)
Predictive best fit	Acquire new logos inside existing vertical	Upload a list of recent high-value, closed-won buyer deals	Scan my entire database of account prospects	List of prioritized best-fit target accounts based on recent high-value, closed-won deals
Predictive upsell/cross-sell	Upsell/cross-sell existing buyers with a new product	Upload a list of recent existing buyers who purchased upsell/cross-sell products	Scan my entire list of existing customer accounts	List of prioritized best-fit target accounts based on recent closed-won upsell/cross-sell deals
Predictive quick-win list	Increase closed-won opportunities to hit last-minute goals for the current quarter	Upload a list of recent high velocity closed-won buyer accounts	Scan my entire database of accounts with open opportunities	List of prioritized best-fit open opportunities with accounts that have high propensity to close faster than others

Account prioritization

Once you have a list of potential accounts, narrow it down and choose which accounts to go after first. To start, choose two to five lists of potential targets—it's better to focus on fewer lists as you're getting started so you're able to iterate quickly and identify areas for improvement. This will help you train your organization's ABM muscles to deliver amazing results faster.

It's vital to prioritize your lists to demonstrate early success and maximize your ABM ROI. Give priority to the account types that are most relevant to you—the accounts where you have a good understanding of the potential buying journey and those that you already have content to support.

Most predictive analytics tools have intent data built in, which is very helpful for prioritizing which target accounts on your lists to focus on first. Intent data should not be used as the only tool for prioritization, but it can be very helpful for knowing which accounts are expressing unusually high intent in the moment and the specific topic they are expressing intent on.

Intent data can also be used to see which dormant accounts are starting to express intent again, telling your sales and marketing teams that it is now time to re-engage them. Additionally, with the right marketing automation solution, you can automate sales alerts that will notify SDRs to reach out immediately in the case that intent scores are extremely high for specific target accounts.

If your solution contains marketing automation and predictive analytics together, you can combine the fit and intent data with your marketing engagement data to see which of your target accounts might have already engaged with your brand on both online and offline marketing channels.

This will help you hyper-prioritize your target accounts for ABM.

"Most companies pay too little attention to their top accounts."

- Christopher Engman, CRO/CMO, Proof Analytics AB

Think in tiers

As you develop your target account lists, you may find that you have a lot and that their priority differs throughout the organization. It can help to think and talk about these differences as tiers. For example, your most important list of accounts would be your tier one accounts, getting more time, resources, and marketing and sales activities dedicated to helping them close. For tier two accounts, you may have a larger target list and invest less, and so on, for additional tiers.

To understand each account's potential for success, you'll need a solution that can synthesize different parameters into a score that you can compare across accounts. These scores may be made up of firmographics, cumulative behaviors, or even incorporate predictive capabilities.

Examples of ABM tactics for different tiered ABM account lists:

Types of programs	Programs	Target account list size		
		Top 20	Tier 1: ~400	Tier 2: ~1,200
Web personalization	Web personalization for individual accounts	Yes	No	No
	Web personalization based on attributes (e.g., industries)	Yes	Yes	Yes
Direct mail	Low-value direct mail	Yes	Yes	Yes
	High-value direct mail	Yes	No	No
In-person programs	Trade shows (invites and free passes)	Yes	Yes	No
	Lunch and Learns	Yes	No	No
	On-sites	Yes	No	No
Database emails	Targeted emails customized to accounts	Yes	No	No
	Mass database sends	Yes	Yes	Yes
Online advertising	Advertising on Linkedin, Facebook, Instagram, pay-per-click, Twitter, etc. (based on attributes, e.g., industry/ competitive solutions) in-house or via third-party tool	Yes	Yes	Yes
Content syndication	Content syndication for target accounts	Yes	Yes	No
	Content syndication based on attributes, (e.g., verticals)	Yes	Yes	Yes
Sales outreach	Calling campaigns	Yes	Yes	No
	Drive attendance campaigns	Yes	Yes	No
Webinars/Virtual events	Target account webinars	Yes	No	No
	Broad-based webinars	Yes	Yes	Yes
Appointment setting	Target account appointment setting	Yes	Yes	No
Contact discovery programs with vendors	Opt-in campaigns	Yes	Yes	No
	Qualified lead discovery program	Yes	Yes	No

Account mapping

Once you've selected and prioritized your target accounts, you'll want to start mapping personas to key contacts inside each account that you confirmed earlier, so you can better understand which buying groups are best to target. You need to understand what challenges each persona faces, how they make decisions, and who makes those decisions. This information is critical to a successful ABM initiative and should be an ongoing effort.

Build a plan to focus on the right part of the organization. Gather research on:

- Financial health
- Business initiatives
- Personnel developments
- Technologies
- Organizational structure
- SWOT analysis
- Industry analysis

Effective marketing starts with understanding your audience, and that's even more important when your audience makes up an entire buying group, or a specific set of key individuals that decides when, what, and where to purchase. The great thing about ABM is that the strategy inherently requires you to have a deep understanding of your target accounts and their pain points. This is the same foundation that you need for developing marketing personas.

A few key questions to ask include:

- Who are your key personas?
- What do they care about?
- Where do they consume information?
- When do different types of content work best for them?

Account mapping tools

The marketing technology landscape is expansive. Here's an example of some technologies you can consider to augment your account mapping.

ACCOUNT DATA	ACCOUNT SCORING
LinkedIn	leadspace
InsideView	MINTIGO
HOOVERS	Lattice
dun & bradstreet	EVERSTRING
REACHFORCE	

NICHE SOLUTION EX. COMPETITIVE DATA

builtwith
Datanyze
GHOSTERY

Launch a pilot program

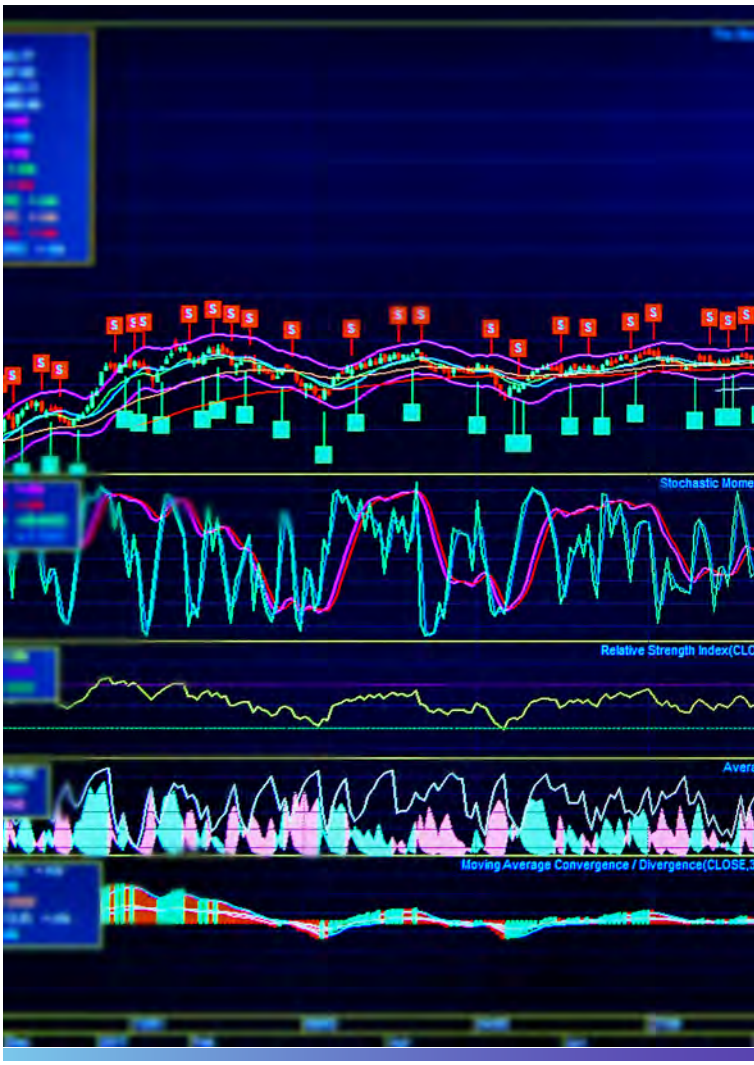
Once you have decided to implement an ABM strategy in your organization, think about a tiered approach to launching the strategy and demonstrating success.

Because ABM can have a very long sales cycle, you will need to show the momentum of your ABM activities in order to achieve the continued investment and buy-in needed to drive sales. As you think about your strategy, identify accounts and metrics that will help you demonstrate early indicators of success.

> *"Like any new business process, it can take time to build adoption. As you get wins, share them in weekly updates and quarterly presentations. It is crucial to stay consistent and drive the momentum of the ABM mindset until it snowballs to full adoption."*
>
> **- Jeff Coveney, Executive Vice President, Digital Pi**

Think of a pilot as a lower-risk foray into ABM that will help you learn about the model and the strategy you have set up. It is an opportunity for marketing and sales to build trust with each other and drive toward the same goal. You'll be able to learn about and get feedback on:

- **Account selection process:** Did your model for choosing accounts work? Are you seeing early indicators of success? If not, what lessons have you learned? What issues have you faced—for example, if reps are churning through accounts, how do you replace them?
- **Marketing and sales alignment:** Are you seamlessly sharing information? How is collaboration working? What needs to improve?
- **Team education process:** Did your strategy go as planned? Were there kinks in the system, and how can you educate the team to correct them?
- **Scoring:** Does the account score and the lead's behavior score accurately indicate the buying stage? Do you need to adjust it?
- **Account load per salesperson:** Depending on the size of your pilot and how many reps you have, you may learn about how thoroughly accounts are attended to and nurtured. Do you need to recalibrate? Or have you uncovered a best practice for your organization?
- **Measurement and reporting:** Any good pilot will give you many lessons to learn from. But it will also give you hard metrics to benchmark against. Ideally, you'll see early indicators of success—like account penetration—that show the momentum of your program. If you don't, go back to the drawing board before you invest more.



Create the right content

Content is an effective way to communicate relevant value to your ABM audiences—and value is what will break through the noise and engage them. Personalizing content for the contacts at your accounts can help give them a satisfying custom-tailored brand experience across all channels, which will result in more loyal buyers and increased revenue. Using a few key techniques, you can create scalable content that supports your ABM programs across the entire buyer lifecycle.

The insight that you've drawn from your account profiling, persona mapping, and account insights (i.e., fit, intent, and engagement data) will help you create content for target accounts more effectively, especially during the mid- and late-funnel stages. Even if you don't start with persona-specific targeting, understanding the decision-maker personas will help you better understand the account/buyer journey.

Map content to accounts and individuals

YOU MAY WANT TO CONSIDER MAPPING YOUR CONTENT TO:

- Account specifics, like industry, business initiatives, or competitive dynamics
- Stage in the sales cycle
- Persona (e.g., CFO or CIO)

Enable sales

Your sales team needs content, too. Some training and key materials include sales playbooks, battle cards, thought leadership content, a pitch deck, email templates, recorded training, and a journey deck. Be sure to consider selecting an ABM solution that integrates with sales engagement tools, so you can focus on keeping the SDR team up to date with the latest messaging and positioning, ensuring that they can personalize their outreach for specific accounts.

Understand what exists

Creating original content takes resources—time and money. Before you start to create new content, look at what content you already have.

You may already have a comprehensive list of content with details about the date it was created, the audience, and so on. But, if you don't, it's probably worth creating, at least as it pertains to your target accounts. This will help you identify content that already speaks to your target audiences and still works, needs an update, or needs to be retired. Plus, it will help you identify content gaps.

Solicit sales' feedback

While content falls under marketing's responsibilities, you may want to get sales' input as well. Marketing will have data that demonstrates which pieces have the best digital responses, but sales will know which ones work best with real people when it's time to close an account.

Develop a plan

Once you understand whom you're creating content for, what content you already have, and the gaps that exist, you can start building a content strategy for your target accounts. Use a content/message matrix to map what content or message you will use to reach your target accounts across the entire buying journey.

Marketing will probably have the bigger piece of this pie—distributing content on emails, the website, social media, and so on. Sales, however, will still be integrating content into personal emails, phone calls, and meetings. Keeping this organized so that no target account receives the same content twice, or irrelevant content for the stage they are in, requires a sophisticated marketing solution and a CRM system that are well integrated.

Test for the best

Like anything in marketing, you can map out audience attributes, analyze their behaviors, understand your existing assets, and create a plan, but you must be ready to iterate. Build testing into this process. If an asset does not work for your target audience at a specific stage of their buying journey, test something else. The best ABM, including content for ABM, adapts to your target accounts' needs to ultimately deliver value.

"Scaling your content for ABM begins with understanding your buyer journey. Who is on the buying committee? What does each person care about at each stage? How can you address their needs while telling a clear, compelling story that calls attention to their individual pains? The answers to these questions will help you prioritize your content."

- Nadim Hossain, Founder, BrightFunnel

Use this worksheet to help you map out a content plan for the personas in your target accounts.

Buying stage	Early Pre-purchase	Middle Commit to change	Late Evaluation
Objective(s)	Build awareness and address pain points	Help buyers find you when they are looking for solutions	Deliver company-specific information to help evaluate and reaffirm selection
Content types	Blogs, ebooks, research data, infographics, webinars, videos	Buying guides, RFP templates, ROI calculators, analyst reports	Pricing, demos, services info, third-party reviews, buyer case studies
Persona #1 **End user**			
Persona #2 **Influencer**			
Persona #3 **Blocker**			

Here's an example of a matrix that maps content to the buying journey of a higher education target account:

Segment asset/type	Awareness	Interest	Evaluation	Commitment
Higher education	Empowering higher education relationship management: It all starts with marketing (Frost & Sullivan paper)	Enrollment, engagement, donation: How higher education can improve its grades with marketing automation (ebook)	UC Irvine case study: Drive enrollment and engagement	Marketing Nation Community & Purple Select advocacy program (community and advocacy program)

Engagement at scale

To effectively engage your ABM audiences, your content needs to meet three criteria: Be personal, be relevant, and be timely. However, creating content that hits all those marks can be challenging. The good news is that the engaging content you'll need for each stage of the buying journey doesn't need to be created from scratch. Repurposing your existing content is a great way to create the content you need at scale.

Revisit your content library and determine what can be tweaked to resonate with your target audience. There are different ways to spin your content to speak to a specific company or industry. You should still consider creating fresh content that is tailored to your key accounts and the individuals within them, but this way, you can save your resources for those bigger efforts.

Engage across channels

Today's buyers are on multiple channels and devices throughout the day. To truly penetrate each account, you need to identify the right people within it and then engage them on multiple touchpoints throughout their buyer journey. This translates into interacting with key decision makers across any channel with the right message—from paid media ads to email to your website—on desktop and mobile devices.

Use a multichannel account-based experience approach

Once you have a solid understanding of the accounts you're going after and the stakeholder personas within them, you can engage them with personalized content across channels. Every touchpoint of your target buyer's experience should be consistent and complementary—that means you must think about the main channels where your potential buyer engages. Use channels that work for your objectives and budget, and take a systematic approach to coordinate your story across channels.

Focus on the channels where your audience is, but remember that it's worth testing different tactics.

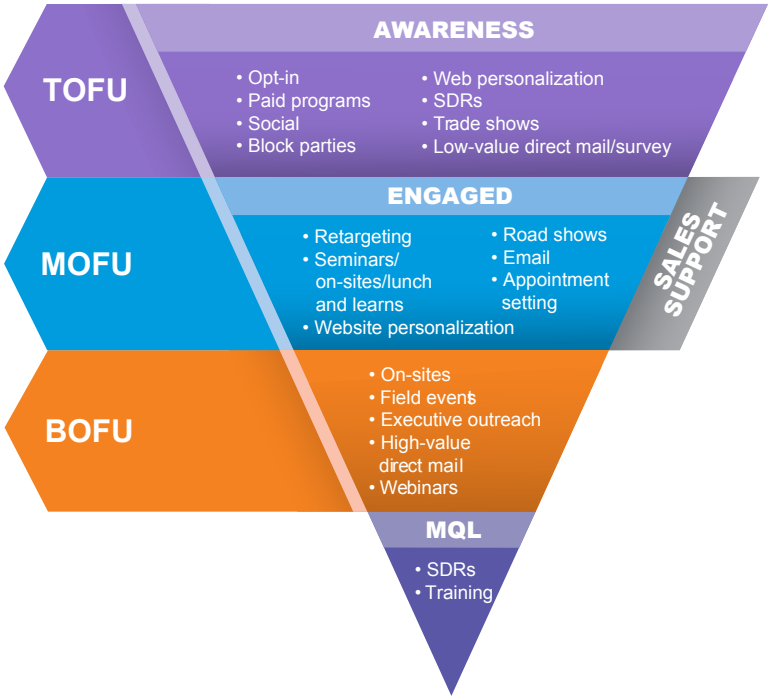
And remember that each interaction with buyers should build on the previous one, no matter which channels your buyers want to engage on.

To do this effectively, you'll want an ABM solution that is more than simply a patchwork of tools, which leaves gaps for mistranslated or unsynced data and channel limitations. Instead, implement a solution that offers both ABM and automation natively. A complete solution will offer cross-channel marketing and advertising capabilities that will provide a foundation for you to deliver informed and coordinated account-based experiences across channels to your target accounts. Cross-channel marketers need tools to help them:

- **Listen:** Pay close attention to a target buyer's behavior across all channels to create a single, integrated view of their activity
- **Learn:** Process all of your target buyer's digital signals for a better understanding of your buyer
- **Engage:** Manage, personalize, and act on conversations with your target buyer across channels

Leverage a funnel approach

Another reason to select a solution that natively supports lead and account capabilities is because even with an account-based strategy, leads flow through your database like a funnel. Leads that have just become aware of your brand/product/service exist at the top of the funnel (TOFU), leads that have engaged with your content or offers are at the middle of the funnel (MOFU), and leads in the process of evaluating their purchasing decisions are at the bottom of the funnel (BOFU). Because your objectives vary at each stage, you may want to leverage different marketing tactics and channels for personalized, consistent messaging across stages.



The tactics and channels you use will differ based on a prospect's familiarity with you. For example, you might use web personalization on your website to display targeted content and offers to website visitors, allowing you to reach a broader audience from your target accounts, whereas you may host a field event, road show, or private event for select later-stage prospects who are already familiar with your offerings and are worth the investment.

"Today, marketers can use data to look at an account in its entirety and understand what messages, programs, and timing work best across all decision influencers and decision makers."

- Nadim Hossain

Online channels

While this isn't a comprehensive list of all the channels available, we'll cover the core online marketing channels you may want to use to target and engage your key accounts.

Website

As you aim to engage your target accounts across channels, web personalization can help you create and continue a personalized experience for your target accounts. When they land on your website, you have only seconds to connect and establish relevance.

Account-based web personalization focuses on a targeted and predefined list of accounts and individuals. It enables a marketer to identify a visitor's company, cross-checking them against a named account list in real time. If the visitor is from your list, you can show them a targeted and specific message, offer, asset, or call-to-action. With web personalization technology and a marketing solution, you can make this experience even more granular and focused by targeting the individuals within an account, giving them unique and specific messages.

This is especially important for brands targeting millennials, because millennials expect personalization. Some ABM solutions use AI to offer relevant content to web visitors at just the right time, which increases conversion rates and provides a better buyer experience.

In this example, we're using our own web personalization product to drive web conversions. On the bottom, you'll see our default website messaging. On the top, we personalized the content and case studies, targeting organizations in the financial services industry.

Chatbots

Conversational marketing tools like chatbots are a great way to take your web personalization to the next level. They also help keep sales and marketing teams aligned as engagement is happening with your brand. Chatbots are proven to increase web conversion and daily demo requests and reduce the sales cycle. They provide site visitors with a highly personalized account-based conversation that is automated to answer questions, gather needs, and even route the live conversation directly to the right sales rep who owns that specific account.

Use chatbots to recognize if the visitor is part of a target account and cater the conversation based on the industry they are in or industry challenges. Work with sales to agree on what the initial automated messaging should be for each target account. Additionally, use the chatbot to automatically look at the sales rep's calendar, and then suggest times for an initial call to the site visitor to maximize the chances of setting up a call if the sales rep is unable to chat in that moment.

Predictive content

Use AI to further increase your web and email conversions by having it automatically recognize which piece of content is working the best for certain account-based audiences. AI is the best way to help you scale your personalization efforts for ABM because it analyzes data in real time, and can also adjust and optimize your campaigns in real time, faster than any team of humans could do. For example, offer multiple pieces of content for certain ABM audiences that your team feels is effective, then let AI recognize which one is driving the most conversions over time and default to showing the most effective piece of content. Next, use those insights to repurpose the most successful piece of content into other forms of content on other online or even offline channels.

Digital advertising

Traditionally, one of the most popular channels for online acquisition is digital advertising, as it offers the ability to reach buyers beyond the channels under the marketing team's control. With ABM, it's extremely important to extend the reach of your brand beyond your controlled marketing channels because it ensures that your account-based experiences are ongoing and continuous even when your buyers are browsing the web. Start thinking about the types of ABM paid media campaigns, such as acquisition, retargeting, and look-alike. Be sure to include use cases to discover new accounts.

Ad targeting accommodates all essential paid media use cases, campaign types, and people-based or ABM strategies

Campaign types

Acquisition

Expose your brand across large audiences

Retargeting

Bring buyers back to your website and landing pages

Look-alikes

Discover new buyers that look like your best customers

Strategies

Target known

Target your known contacts within current customer contacts

Discover more known

Discover new contacts within existing customer accounts or prospective target accounts

Discover net new

Discover new contacts that look like your best customers

Use cases

Nurture

Personalize multiple ad campaigns based on different nurture program streams

Events & webinars

Personalize ad campaigns that include forms for registration

Web & email

Personalize ad campaigns with consistent messaging based on web and email channel activity

Acquisition

Paid media is an effective way to maintain brand awareness, or keep your brand top of mind, especially for target accounts that you know are actively engaging in a buying cycle or expressing intent. Build ABM audiences using intent data and target them across the web with personalized content based on the topics they're interested in.

Retargeting

Website retargeting—which places display ads across an ad network for a website visitor who does not take the desired action—is one way to use intent data to personalize content across the web. Another way is to push lists of your key influencers from target accounts to your ad platform and target them with relevant offers. With both web and ad channels communicating with your marketing solution, you can use ad targeting and retargeting to offer a truly personal and coordinated cross-channel experience.

Let's take a deeper look at how this works. By placing a tracking pixel on your website, you can follow your target account contact when they leave and place an ad on another, unrelated website to stay top of mind and persuade them to come back or offer a relevant next piece of content. It's not just about serving ads to target accounts at the right time; it's about retargeting them with the right ad—one specific to their needs or interests.

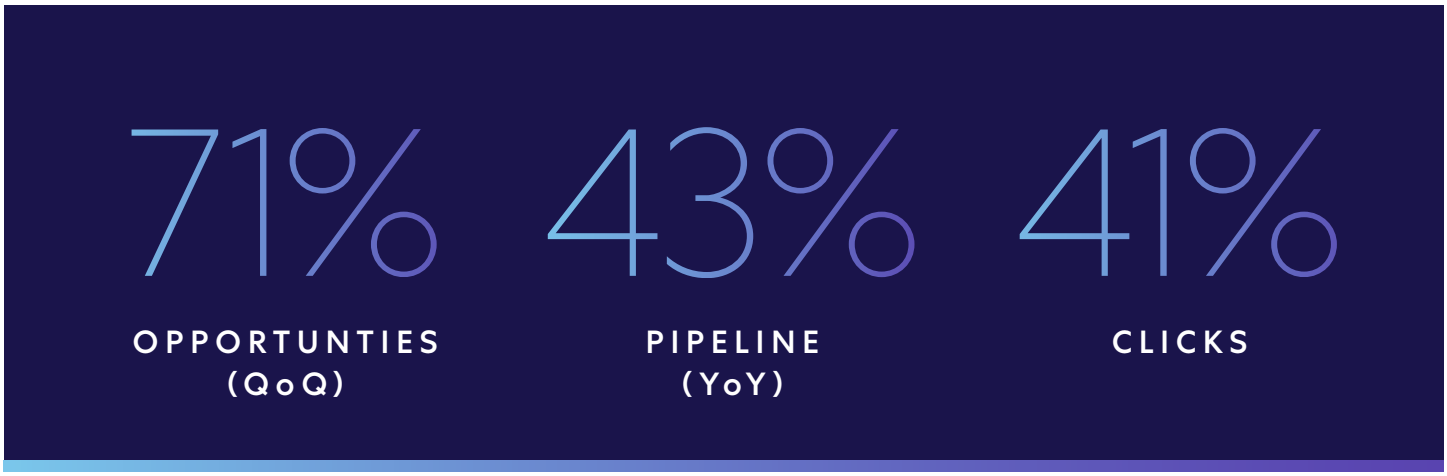
If your web personalization system is part of an overall engagement solution, you can leverage a site visitor's lead score, engagement score, or buyer stage to further personalize web experiences and retargeting ads. Targeting your ads to the right prospects—those who have already engaged with your brand and expressed interest—is a great way to improve ad ROI, and personalizing those ads further increases your results and ROI.

Look-alikes

Another great reason to do paid media for ABM is contact and account discovery. This can be achieved by running look-alike campaigns. ABM paid media networks have their own cookie pools of contacts that are already mapped to specific accounts, which means you can match your accounts and contacts with theirs to target contacts you know and contacts inside a target account that haven't converted with your brand yet. In other words, paid media is great for hydrating your target account lists. You can also use B2B networks for discovering all new accounts. Send them a list of your current target accounts, then use their data enrichment and look-alike models to suggest similar accounts to send ads to across the web.

When considering doing paid media for ABM, make sure you have an ABM solution that offers ABM nurturing and automation capabilities. This will help ensure that, as contacts from target accounts convert, you can put them in the appropriate nurture program, so that you can continue the appropriate account-based experience with the most relevant messaging based on their place in the ABM funnel.

At Marketo, our retargeted ads, which are done through Marketo Ad Targeting, resulted in 71% more opportunities, 43% more pipeline, and 41% more clicks.



Email

Email marketing is still one of the most effective ways to market to known prospect and buyer audiences, especially your target accounts.

Account nurturing across the entire buyer lifecycle is better with a personalized web experience and emails that draw on the same data to pick up where it left off. Marketers can send personalized emails to their target accounts that continue a conversation or start a new one. Some ABM solutions even use AI to dynamically personalize email content to be hyper-relevant to the account and contact.

On the right is an example of a personalized email that our sales reps sent to our target account prospects.

These emails resulted in a 25% open rate and were automated through Marketo Sales Insight, which reveals interactions with emails sent to prospects and through Salesforce, Microsoft Dynamics, and Outlook and Gmail plug-ins.

Marketo

Dear John Smith,

In today's increasingly competitive higher education landscape, running an institution's technology strategy is no mean feat. According to a recent KPMG survey, student recruitment, fund-raising and technology enhancements are now top priorities for colleges and universities.

Because the student journey is constantly evolving, an investment in marketing automation can help institutions stay relevant and competitive. A marketing automation platform can serve as a centralized backbone of campus-wide communication, while providing a 360-degree view of student behavior. Departments can engage their students in a personalized way at scale across the student lifecycle - which does not stop at enrollment, but extends to matriculation and advancements as well.

Enclosed is a comprehensive report by Hanover Research on 2016 trends in higher education marketing, enrollment, and technology. This report explores trends on student enrollment and advancement, as well as how technology will impact higher education next year. I hope you will not find this insignificant.

I would like to speak with you for 30 minutes to discuss how marketing automation can help augment your technology stack and share how other universities are exceeding their goals using Marketo. I will follow up with you shortly to set up some time. Please feel free to email or call me as well.

Thanks

Paul Cowing
AVP Enterprises Consumer Industries
750.268.8586
paulco@adobe.com

Offline channels

While this isn't a comprehensive list of all the channels available, we'll cover the core channels you may want to consider as you target and engage your key accounts.

Direct mail

Historic approaches to direct mail largely centered around long hours of preparing one-off mailers to large audiences that were painstakingly pulled together. However, a digital marketing solution with marketing automation will leverage previously configured audiences and dynamically personalized content assets that are already tied to your overall campaign strategy and connect time-released materials to buying signals—enabling personalized direct mail at scale.

For example, once a decision maker from a target account downloads an asset from your website, you can trigger a direct mail piece to them. Because direct mail can be costly, you'll want to make sure the offer or content is highly personalized and relevant to the buyer. You'll also need clean data so your pieces are going to the right leads and addresses.

Private events and webinars

Physical events span from trade shows and road shows to private dinners, but keep in mind that they will vary based on your objectives. If you're targeting key accounts who are just becoming familiar with your brand, they may not be receptive to a luncheon. However, if a prospect is already engaging with your brand, then your efforts may be more successful.

For more intimate events, consider inviting a thought leader or influencer to present. You want to provide your target account prospects with new, valuable information, and inviting a third-party speaker can accomplish that.

Webinars are great for marketing thought leadership and establishing credibility, no matter what stage your target accounts are at within the buyer journey. Like intimate events, consider inviting a thought leader or third-party speaker, depending on your webinar's goals. The most successful webinars tend to be less "salesy" and more inspiring. For ABM, target your webinars by industry or vertical so the content and thought leadership is relevant to the accounts that you would be inviting.

By incorporating both online and offline events into your ABM mix, you can accomplish your objectives for every stage of the buyer's journey.

Account-based marketing for outbound prospecting

Multichannel approaches aren't just a best practice for marketing. Sales development teams should use both online and offline channels to drive outbound opportunities. Based on the accounts that marketing and sales decide to pursue, sales can prioritize its outreach and follow up on higher account scores that have the propensity to purchase.

Sales should use a variety of channels—email, social media, and cold calls—to do research on and target different stakeholders within each account. Informed by data from your marketing automation solution and CRM system, they can ensure that they're having relevant conversations with their prospects and tracking their progress. While sales is doing most of the outreach here, marketing should still be closely involved, improving sales enablement, coordinating programs and messaging, and providing air cover when needed, all while ensuring two-way visibility of activities across teams.

Here are a few channels you should consider for outbound prospecting:

- **Email:** Email is one of the most effective channels of communication, whether it's for ABM or a broad-reaching strategy. With automated solutions, you can scale your email sends with templates that still have a personal touch. Make sure this is integrated with your marketing automation and CRM systems, so you're able to track every communication.
- **Company website:** Browse your target account's website to find more information that you can leverage in your communications, such as their mission statement, recent news, and products/services. You can also look at specific job openings on their website to see whether they're utilizing or evaluating your solution.
- **Twitter and Linkedin:** These social platforms are great for listening to what your prospects are talking about and sharing with their network to personalize your outreach. You can then respond and build the relationship on a more personal level.
- **Cold calls:** Schedule times to call your prospects when they're most likely to pick up the phone.
- **Tech trackers:** Leverage browser plug-ins like Ghostery to get insight into what the tech stack looks like for your target accounts.

Measure, analyze, and optimize

ABM requires sales and marketing to broaden the reporting lens and focus on measuring overall account engagement instead of individual lead engagement. How can you gauge the success of any strategy without understanding its revenue impact? You can't. Your ABM strategy needs to be measurable for you to demonstrate success and improve over time. So, your ABM solution must make your results actionable, intelligent, and available in real time. Your ABM solution must also measure overall account-level engagement across specific and multiple accounts, because account engagement is required to be one of the main success metrics for ABM that both sales and marketing must adopt.

Define your revenue model

An important first step for campaign measurement is agreeing on your revenue model and its stages and definitions.

For B2B organizations, this typically looks like a funnel. When it comes to ABM, however, your model may look different.

In a sense, account-based marketing flips the broad-reaching marketing funnel that we're familiar with. Traditional demand generation works by generating awareness with a large audience. But with ABM, you start by identifying qualified leads within the right buying group, then work on engaging, expanding, and driving advocacy with them. ABM requires you to work in tandem with your sales team to identify accounts, target them, and measure overall account engagement, which removes any uncertainty around revenue attribution.

Measure over time

Some marketers only measure their campaigns immediately after deployment. In doing so, they miss some critical metrics.

Metrics that tie directly to revenue take time to mature, especially for high-value accounts, so you'll need to look at different sets of indicators throughout time. Understanding and agreeing on the indicators for success at different points in time will not only help you measure your ABM strategy and program success, but will also help you communicate momentum to the rest of your organization, making it easier to continue to invest.

While you set goals and establish initial analytics as a baseline before you launch your ABM campaigns, it's important to keep a constant eye on metrics as your campaigns run and when they conclude.

Return to your analytics often to see how campaigns are performing per target account groups. Learning and optimizing is easier with ABM because you can focus on a smaller group than you do with traditional demand generation activities.

Look at campaign performance: Are you appealing to the targeted accounts? Are they engaging and taking the next steps you outlined? How close does the actual buyer journey come to the one you've laid out?

Establish metrics for all stages

To determine program success, you'll need to look at how your ABM campaigns perform in each stage (early, mid, and late) to understand whether you're achieving your objectives.

Top of funnel

While it may take time for ROI-centric metrics to mature, you can easily determine an account's early levels of interaction so you can gauge future performance. Have they been to your website before, or not? If so, have they downloaded or engaged with content? This information lets you know what you can initially expect from the account.

The most important reason to establish analytics up front is to create a strong foundation for your ABM program reporting. Here are some additional benefits to setting up analytics first:

- Getting a baseline
- Providing value to sales
- Scoring quick wins

To understand how your target accounts are responding to your messages, one metric you'll want to track right from the start is their account score, which will help you understand their overall engagement.

If you are not seeing engagement across your target accounts, it is an indicator that you should revisit and rethink your program mix and content strategy. If you are seeing engagement, you want to look at specific channel metrics to see which channels are performing the best. Some of those channel metrics may include:

- Ad views
- Web traffic

> *"Readiness, activity, and output KPIs help the organization understand what it's doing to support overall objectives with large strategic accounts, and provide confidence that it's building toward the impact metrics that leadership cares about most."*
>
> **- Matt Senatore, Service Director, Account-Based Marketing, Sirius Decisions**

Middle of funnel

Some middle-of-funnel marketing campaign and channel metrics you will want to look at include:

- Web engagement to identify potential buyers
- CRM information that the sales have logged
- Sales feedback to see how close the prospects are to engaging

Bottom of funnel

It may take some time to measure bottom-of-funnel revenue, but it's essential for determining the success of the project. Without understanding overall revenue, you have little way of knowing whether the campaign achieved ROI. This information is vital to securing the budget for future campaigns.
Look at late-stage metrics from your ABM campaign, including:

- Opportunities created
- New buyers

Here are a couple different criteria models you can use to think about your metrics:

BANT criteria

Budget. Authority. Need. Time.

PUT criteria

P = Buyer pain point
U = Buyer use case. Does it align with your products/solutions?
T = Buying time frame. Does it align with your sales cycle?

Analytics that inform

As you set up reporting and analytics, it's important to see the status and progress of your ABM activities from a high-level program view down to the individual account activities.

Understanding your success at all levels—from account insights to account score to account-level rollup of lead data—will not only help you optimize the marketing activities and engagement for each account, but it ultimately provides sales with the information they need to close the deal.

To do this, you'll need to have a dashboard that includes three different views—the summary view, the account list view, and the account view. These views provide different levels of insight into your ABM activities. A solution like Marketo Engage's ABM Essentials provides the insights that marketers need to determine their success and move their strategy forward at every level, all from one unified tool.

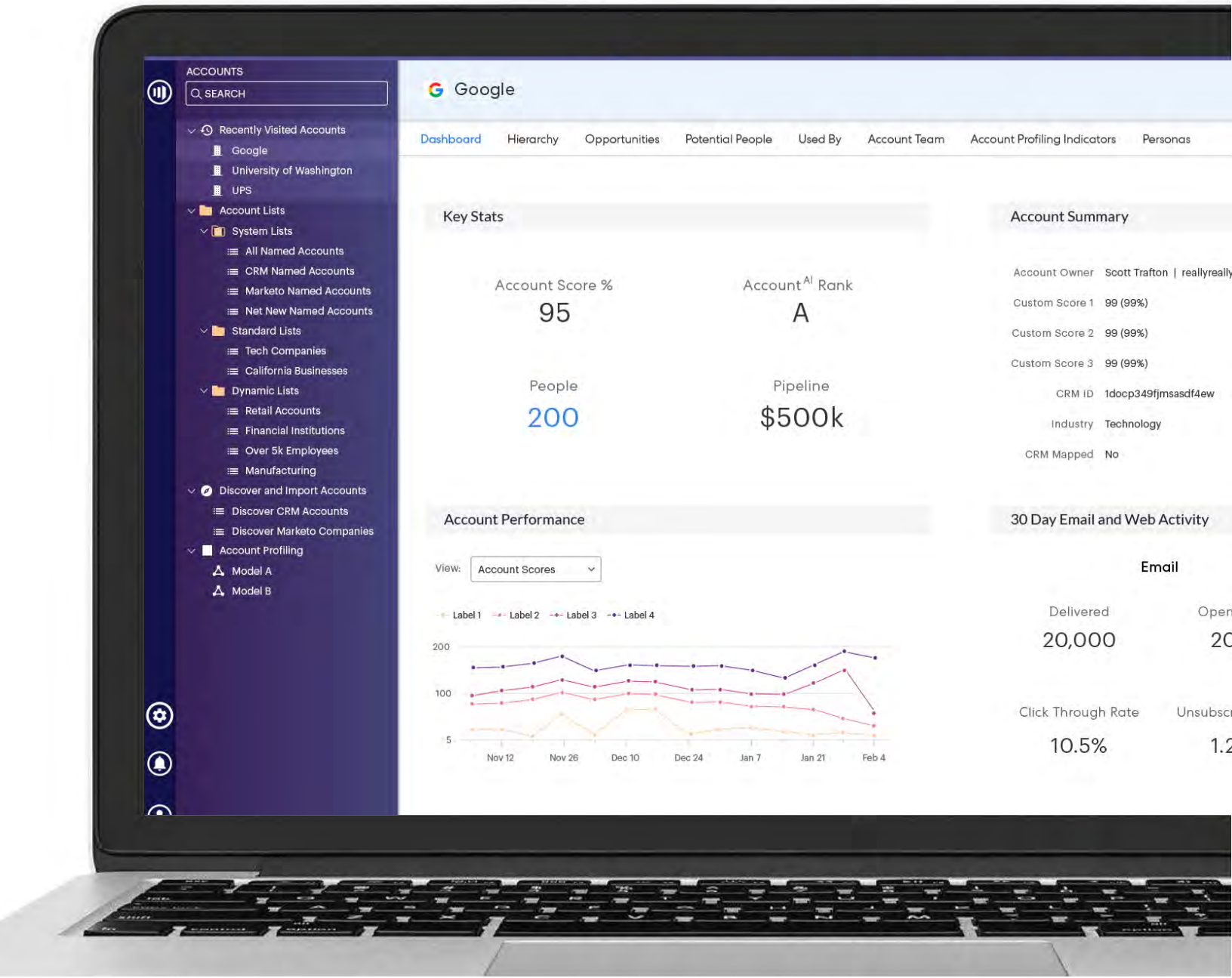
> *"No matter what your marketing strategy is, the primary KPI to track success is always going to be revenue. However, because the time from first touch to closed-won revenue can be lengthy, it is still valuable to measure indicators of revenue at various stages of the funnel—from engagement to deal size, velocity, and win rate."*
>
> **- Dave Rigotti**

ABM dashboard

ABM dashboards show marketers and sales leaders a high-level view of the status and results of their ABM campaigns. This view highlights the top 10 accounts, based on pipeline.

The account dashboard should provide a deeper look at a specific list of accounts. In this example, it is a list that shows marketers the number of named accounts, account list score, and pipeline generated to date.

At a glance, here are the benefits and purpose of each view:



View **1:** Target account summary

This view shows the progress and health of your ABM efforts across all your target account categories and helps you understand the status of your ABM efforts at a glance—from new names to bookings generated.

View **2:** Account list

This view allows you to visually benchmark your progress in your target account groups against one another. The list view makes it easy to identify success in one account group and evaluate if it's an activity or process you can replicate in the others. It also allows you to identify and mitigate any issues with an account group.

View **3:** Individual accounts

This view consolidates all your individual account-level ABM metrics into a single dashboard, allowing sales and marketing to understand account progress in one place and identify areas for improvement, focus, and more investment. With this view, you can quickly see how an individual account is performing on each benchmark.

Named account dashboard

The named account dashboard gives you the deepest dive into your target account metrics. It provides all the relevant information about an account in one place, showing key metrics, including account score, number of the people in the account, and the current pipeline. In the dashboard, you can see the top 10 leads from your target accounts and the interesting moments, which show the target account's activity, enabling sales reps to have more relevant, effective conversations.

Within the named accounts dashboard, sales and marketing have the ability to roll up all the opportunities at an account level. It shows the marketer all open opportunities, the stage they are in, the pipeline amount, the account owner, and the expected close date.

Additionally, an advanced report builder provides marketers a way to measure ABM program impact on specific accounts using a variety of filters and visualizations.

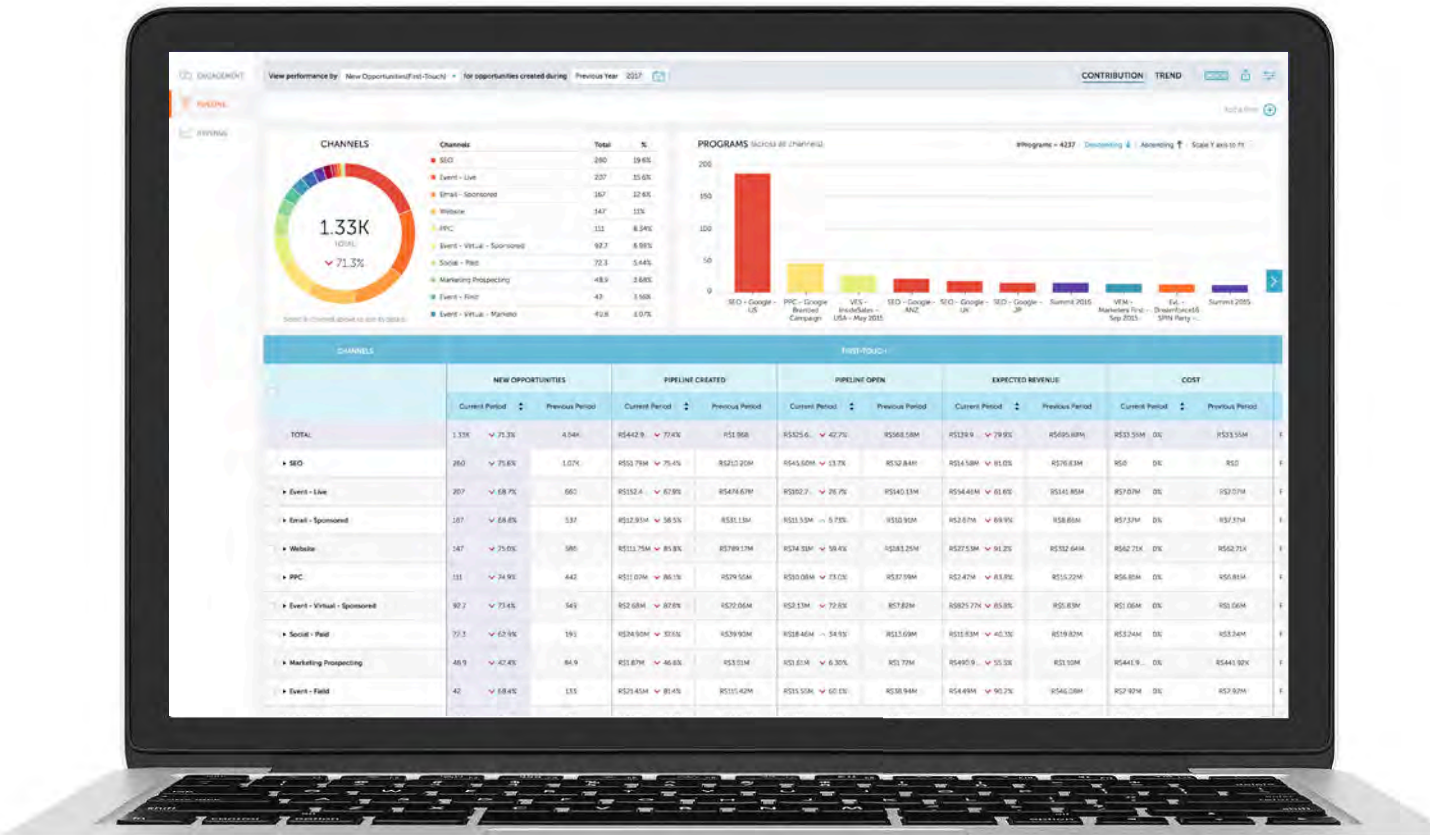
Additional reports

Because ABM is a very targeted strategy, you'll need to look beyond metrics that measure marketing-sourced pipeline. Instead, you must demonstrate how your programs influenced deals and improved ROI. Effective ABM programs should result in accelerated deal velocities and more closed-won deals.

This means you need to track additional metrics, such as:

- **Account penetration:** The number of key people (decision makers, influencers, etc.) that are in your database and opted in.
- **Average selling price (ASP):** The deal size of closed-won opportunities from target accounts. The average deal size of target account opportunities should be higher than that of other accounts.
- **Average rate of return (ARR):** The average revenue generated each year.
- **Win rate:** The number of closed-won opportunities as a percentage of total number of opportunities closed. Like ASP, this should be higher for target accounts compared to default accounts.
- **Velocity:** The number of days it takes for an account with an open opportunity to become a buyer. This should be smaller for target accounts than default accounts.

Because this data lives in your CRM system, it's important to set up dashboards that allow you to track it. The report to the left tracks the ARR of target accounts against non-target accounts. As you can see, target accounts resulted in as much as a 35% increase in ASP. The report below shows the number of target accounts being engaged out of the entire database. While only 4% have been reached in this example, it drives 30% of pipeline.



The ABM maturity curve

While more organizations have started to realize the value of ABM, it's likely that each organization's journey will be unique.

Some companies have just started to evaluate ABM, while others have been practicing it for years. We've identified four key stages of the ABM maturity curve, although these stages are fluid and your organization may be positioned between stages. Wherever you are in your ABM journey, it's important to continually optimize your strategy to move forward.

"In the next two years, we will see many B2B enterprises continue along the ABM maturity curve, moving from initial pilots in a single geography (e.g., North America) to planning, budgeting, and running 'always-on,' global ABM programs."

- Mani Iyer, CEO, Kwanzoo

	ACCOUNTS	MESSAGING/ CONTENT	PROGRAMS	METRICS	TEAM
Inception	Identify what type of accounts make sense for your business	Identify personas and content gaps to understand if you have relevant content for all personas	Identify optimal channels and programs	Ensure you can measure at each stage of the lifecycle, including that your account activity can be tracked in Salesforce or another CRM	Identify key players and select champion salespeople
Early-stage	Select accounts jointly between marketing and sales/buyer support/services, etc.	Develop/ repurpose content for key buyers so it's personalized	Utilize some digital programs in combination with other program basics	Track engagement (e.g., time with account) and other program metrics, like click-through rate, inquiries, and MQAs in target accounts	Obtain stakeholder buy-in across the organization
Mid-stage	Use predictive models and/or intent data to select accounts for additional accuracy Identify whether you have the correct information for the contacts in your target accounts	Ensure you have personalized, timely content for all personas	Run programs that are optimized for different personas (channel, etc.)	Track meetings with the right people in target accounts, velocity, opportunity/ pipeline creation in target accounts, and sales metrics	Ensure the team is closely in sync with your SDRs and sales team
Late-stage	Mature the account selection process and build out white space and data hygiene Identify ways to implement ABM for cross-sell, upsell, retention, etc.	Create and maintain personalized, timely, and relevant content for all personas	Run a combination of digital and analog programs (e.g., AI-powered web personalization and direct mail)	Hit your KPIs, including revenue won in target accounts, cross-sell, upsell, and renewal (stickiness)	Ensure the team is closely in sync with your collaborative teams and regions, including SDRs, sales, support, services, etc.

Select the right ABM solution

Whether you're an ABM novice or a seasoned professional, having the right tools is critical. In fact, in many cases, finding the right ABM solution can make the difference between short-lived, tedious, isolated programs and scalable, long-term success. It can also mean the difference between one-off, random customer interactions and long-term, continuous account-based experiences. A strong ABM solution allows you to take a customer experience-first approach to your strategy, giving buyers a positive experience across all channels. It has both strong lead and account-based capabilities that empower each other to create the right mix for your business without disrupting your current efforts.

Today's leading marketing automation solutions offer many components of ABM technology, including AI-assisted account selection, account-based channel execution, and multi-touch revenue attribution. This allows marketing and sales teams to use a mix of inbound and outbound tactics, as well as a mix of account-based and lead-based strategies to address different buyer segments.

To maximize the full potential of ABM, you must choose and implement a digital technology that can grow with your organization and its needs.

Look for a unified platform with automation

Key benefits of a unified ABM solution with automation:

- **Centralized lead and account data:** Contain all levels of data in the same solution to avoid having your lead and account data in different tools, which causes data inaccuracies, inconsistencies, and ultimately, undesirable customer experiences.
- **Lead and account targeting:** Target specific individuals within target accounts from a single solution instead of managing and syncing accounts and lists between several point solutions.
- **Full-scale cross-channel automated engagement:** Automate coordinated and personalized cross-channel ABM campaigns beyond a single channel, like paid media, from a single platform instead of managing a separate app for each channel (email, web, ads, etc.).
- **Account-level measurement:** Roll up all account programs and revenue-based account analytics instead of pulling data from various systems.
- **Account-based experiences:** Provide accounts with personalized account-based experiences across all channels that focus on long-term lifetime value using an ABM solution that delivers helpful, relevant content to assist them at each step of their journey.

Your marketing solution should offer capabilities for account targeting and management, personalizing cross-channel engagement, and revenue-based account analytics in a single solution like ABM Essentials, offered by Marketo Engage, part of Adobe's Experience Platform.

Built on Marketo's proven marketing automation backbone, ABM Essentials includes account-based planning, engagement, and measurement capabilities that are all natively integrated into a single, easy-to-use solution, and that complements Marketo's existing familiar workflows and lead-based programs without unnecessary disruption and additional tools. ABM Essentials uniquely enables sales and marketing teams of all sizes and maturity levels to add elements of ABM at their own pace by creating the optimal mix of account and lead-based capabilities that quickly close strategic account opportunities.

Integration is key

The best way to avoid a "Frankenstack"—a set of siloed tools that an organization tries to force into working together—is to have a complete view of what your organization needs and wants to accomplish.

Without this, you are liable to add one-off tools for specific tasks that each team will use in silos.

It's critical to identify, agree on, and understand what the hub of your ABM technology stack will be. It must be extensible; keep your accounts, opportunities, leads, and contacts organized; and allow you to orchestrate cross-channel campaigns and consolidate your ABM metrics.

This is another reason alignment with sales is critical. Being on the same page will decrease the chances of mistakenly purchasing tools that don't work best for everyone. Gather with your key ABM stakeholders from different teams to agree on the following things:

1 DOES THE TECHNOLOGY FILL A REAL NEED?

2 DO YOU GIVE PEOPLE ENOUGH TIME TO EVALUATE TOOLS?

3 WHO WILL MANAGE THE TOOLS?

Identifying gaps and adding missing tools is critical to your ABM success, but just as important is having a solution that can easily integrate with your other core technologies.

Depending on your organization, you may want to consider evaluating complementary solutions for account data, company insights, competitive intelligence, predictive software, content marketing, direct mail, and event management. This could include selecting a solution that has a vast partner network that you can use to build the right ABM recipe for your brand.

The right framework will help you evaluate your digital needs. By determining your business model, go-to-market strategy, organizational needs, and integration requirements, you can discover the right solution(s) that will grow with your company.

"Invest in a data-driven technology stack that can support your integrated workflows. You want to find the right combination of techniques and tools that give you an edge over your competition and get you into the right deals early."

- Amar Doshi, VP of Product, 6sense

Add value to your ABM strategy with complementary solutions

Don't add new technologies to your martech stack just for the sake of adding them. New solutions should be evaluated by how well they integrate with your existing technologies and whether they truly add value. Here are some complementary add-ons for ABM.

Account data enrichment and contact discovery

These add-ons can provide you with firmographic information and account intelligence on organizations (e.g., employee size or all the companies in a specific industry). Account data enrichment tools include companies like InsideView, D&B Hoovers, Dun & Bradstreet, ReachForce, RingLead, Leadspace, DiscoverOrg, ZoomInfo, Metadata.io, Demandbase, and Madison Logic.

Predictive scoring and profiling

This technology leverages historic and current data on your current buyers to identify other accounts that are similar and have a high propensity to buy. Some account scoring tools include Leadspace, Mintigo, Lattice Engines, Infer, 6sense, and EverString.

Cross-channel engagement

These add-ons help you increase the number of channels that you have. They help you extend the reach of your account-based experiences across more marketing channels, so that you can be sure to engage your target accounts on the right channels. Some cross-channel engagement tools include Ceros, Vibes, Certain, Vidyard, PFL, Zoom, ON24, and Oktopost.

Sales and marketing partnership

These add-ons can further enhance the partnership and collaboration between sales and marketing teams. They generally focus on maximizing visibility between both teams, which helps them decide the next best account-based experience together for the potential buyer. Sales and marketing partnership tools include Drift, Conversica, Folloze, and ONE Media.

Niche solutions

Some add-ons have a very specific focus that doesn't fit neatly into other categories. This could include account intelligence tools, such as BuiltWith, Datanyze, and Ghostery, which reveal companies that are using specific software technologies. This competitive data allows you to identify target accounts that have the right product fit, and gives you insight into what their current tech stack looks like, so you can see what activities and programs they are already running.

Support cross-channel and cross-team coordination

The right technology will enable your cross-functional teams to deliver coordinated and seamless campaigns that provide buyers with a satisfying experience and offer relevant content to help them with their purchase decisions.

An engagement solution like Marketo Engage offers cross-channel capabilities, helping you track and manage your ABM target accounts and enabling you to deliver informed, real-time, and coordinated engagement and targeting. Your target account's behaviors are captured in Marketo's Audience Hub, which equips you to deliver highly personalized messages at exactly the right time. Marketo's ABM solution, ABM Essentials, includes account-level insights and profiling, contact discovery (including paid media), cross-channel engagement, sales and marketing partnership, and measurement and attribution—giving you the ability to deliver account-based experiences seamlessly across channels.

A successful strategy also involves close collaboration with cross-functional departments, including sales, professional services, and buyer success. You'll need the proper technology to give these groups a real-time, account-level view to coordinate outreach and drive alignment across teams so they can go after key accounts in a coordinated and collaborative way.

Worksheet

Selecting the right ABM technology

Tools specifically created for ABM offer a lot of benefits for companies just adopting the strategy, as well as those who've been executing ABM for some time using multiple, disparate systems. The right ABM solution can provide valuable insights while reducing the efforts involved in personalizing campaigns and monitoring effectiveness.

If you're considering purchasing and implementing an ABM solution, make sure that the software you choose will fulfill your company's needs throughout the entire ABM lifecycle—from forming a strategy and compiling your list of target accounts to distributing personalized ABM content across channels and measuring campaign effectiveness. Use the resources below to choose a vendor who will meet your company's short-term and long-term needs.

Vendor selection checklist

A sophisticated ABM solution enables strategic decision making with data aggregation, insight management, and real-time analytics. The right tool should simplify your transition to ABM, help you identify optimal target accounts, and enable quick shifting when data and insights reveal opportunities or inefficiencies. Additionally, you want to choose a solution based on your ABM road map. Think about what technology will be at the center of your growth.

Look for a comprehensive ABM solution, because using multiple tools for implementing, executing, and analyzing ABM campaigns is time consuming and prone to error. A complete ABM solution will:

- ☐ Simultaneously support lead and account-based programs
- ☐ Assist with target account identification
- ☐ Allow for cross-channel campaign management and nurture automation from a single solution
- ☐ There are organizations with needs that your solution clearly addresses
- ☐ Provide comprehensive, real-time analytics
- ☐ Give you the ability to utilize historical data from existing marketing automation and CRM systems

ABM vendor selection checklist

REQUIREMENT	WHY IT'S IMPORTANT	NECESSARY FEATURES	
Assists with identification of target accounts using the power of AI	Success with ABM starts with targeting high-value accounts—those that are most likely to drive revenue or have strategic significance.	Allows you to segment and view accounts by important criteria	☐
		Matches existing and new leads to their respective accounts	☐
Automatically connects leads to accounts	Identifying anonymous visitors provides opportunities for relationship building and personalization.	Identifies anonymous leads	☐
		Can match anonymous leads to the correct organizations	☐
Provides an aggregated view of buyer behavior across all channels	Knowing what actions visitors take when viewing your website or campaigns enables you to identify conversion opportunities and provides valuable data that can be used for effective personalization.	Shows what campaigns and/or channels drew a visitor in	☐
		Monitors what visitors click on and what content they view	☐
		Tracks visitors' actions across all visits	☐
Orchestrates personalized, cross-channel marketing campaigns	Effective engagement with target accounts requires consistent and complementary messaging across multiple channels, using AI to recommend relevant content at just the right time.	Manages campaigns across multiple channels from a single solution	☐
		Integrates seamlessly with existing marketing automation, nurturing, and CRM software	☐
		Serves dynamic content based on a website visitor's origin, behavior, organization, and place in the buying cycle	☐
		Delivers highly personalized content and calls-to-action at the appropriate time	☐

REQUIREMENT	WHY IT'S IMPORTANT	NECESSARY FEATURES	
Consolidates comprehensive, real-time ABM analytics and attribution reporting	Measuring the performance of campaigns across target accounts, performing A/B testing, and adjusting quickly when campaigns are underperforming are critical to campaign success.	Provides real-time, actionable analytics	☐
		Offers summary views of account data and findings, as well as detailed views for deeper dives	☐
		Provides revenue impact data (attribution)	☐
		Measures key stakeholder engagement	☐
Provides the ability to use historical data from marketing automation and CRM systems	Historical data gathered over time is very valuable for scoring and profiling accounts.	API integration or easy import functionality to access historical data from marketing automation and CRM systems	☐

Important questions to ask ABM solution providers

Once you've determined that a vendor's solution meets your needs, you can narrow your choices further by considering if the vendor's company is the type of organization you want to work with long term.

- [ ] **Will the software integrate seamlessly with existing marketing automation and CRM systems?**
  If one of your ABM goals is to create a comprehensive place to manage campaigns and view data and analytics, you're going to want the new solution to quickly and easily pull in historical information from existing marketing and sales systems.

- [ ] **What plans does the vendor have for optimizing and improving their product in the future?**
  Getting insight into the vendor's road map will allow you to determine how dedicated the vendor is to managing and improving the software long term.

- [ ] **What level of support does the company offer?**
  Does the company offer technical support for its software? Is support available anytime it's needed or only during limited hours? What is the turnaround time for support queries? Does the company also provide business support for your company's transition to ABM?

- [ ] **How much training will be needed to use the software, and how is that training offered?**
  Getting thorough training for sales and marketing teams will be critical in promoting adoption and achieving success.

- [ ] **What other companies has the vendor worked with?**
  Ask for references from other companies that have used the solution in the past or are currently using it, or ask the vendor to provide case studies highlighting the successes other companies have had.

Making the final decision

If you find that more than one vendor satisfies your needs for software, training, and support, there are a few more things you can consider when making your final decision:

Price

If you're equally satisfied with more than one vendor, considering which vendor offers the most competitive pricing could help you make your final decision.

Authority and credibility

Does any vendor stand out as an ABM expert, actively engaging in ABM as part of its own business model and using its own software? Is the vendor considered an influencer in digital marketing? A company with ABM authority—and digital marketing authority—may be more equipped to provide tools that cater to the needs, pain points, and best practices of the industry.

The right ABM solution can help you avoid laborious efforts that lead to disappointing sales metrics. It can help you achieve continued growth and long-term success. So, make sure you spend time asking the right questions to ensure the vendor you choose to work with provides everything you need to succeed with ABM.

Conclusion

While ABM is not a new way to strategically market to target accounts, it's now a scalable, achievable strategy that organizations of all sizes can implement to focus on whole lifecycle marketing for key accounts. Modern ABM solutions give marketers the ability to provide a superior account-based experience (ABX) to leads and contacts associated with accounts by automatically delivering relevant messages across all channels and stages. Marketing, selling to, and supporting your buyers at an account level is not only critical to your success, it's what your buyers expect. Competitive organizations that are focused on engaging buyers across the entire lifecycle and throughout their buyer journey need to sell at an account level, understand the influence of the different contacts, and speak directly to them. Today's buyers demand personalized content and engagement, and customer experience is quickly rising to become a major competitive differentiator.

The ABM we practice today is entirely different than the manual processes of days past. Implementing an ABM strategy no longer means an astronomical investment—but it does mean increased revenue, focus, and partnership within your organization. ABM works—and it's not going anywhere. With the right tools and an understanding of how to implement an ABM strategy that works for you, you can create a better and more personalized experience for your buyers, and reap the benefits for your business.

About this guide

Marketo

Marketo, an Adobe company, offers the solution of choice for lead management and B2B marketing professionals seeking to transform customer experiences by engaging across every stage of complex buying journeys. Natively supporting both lead and account-based marketing strategies, Marketo Engage, as part of Adobe Experience Cloud, brings together marketing and sales in a comprehensive solution designed to orchestrate personalized experiences, optimize content, and measure business impact across every channel, from consideration to conversion and beyond. To learn more about Marketo Engage, the vast community of passionate marketers in the Marketing Nation, and Marketo's robust partner ecosystem, visit www.marketo.com.

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