Triblio
FROM IDG

EBOOK

The Modern Marketer's Guide to ABM



CONTENTS

Introduction 4

- The B2B Buyer Journey

Ready? 11

- Find Organisational Support
- Define Your Ideal Customer Profile
- Develop a Target Account List
- Assess Current Campaigns

Set Up ABM Campaigns 18

- Build Audience Segments
- Source Stakeholder Contacts
- Establish Account Metrics & Goals
- Design Multi-Channel Orchestration

Go! Execute ABM Campaigns 29

- Generate Revenue in Large Prospects
- Increase Opportunities in Small and Midsize Prospects
- Increase Cross-Sell and Upsell with Large Customers
- Increase Leads in Target Accounts with ABM

Appendix 37

- Worksheets to Get Started with ABM

PREFACE

In the Modern Marketer's Guide to ABM, you will find content designed to help you prepare for the future of marketing. Learn how to set your organisation up with intent-driven and highly personalised campaigns, and discover real-life case studies and testimonials from leading ABM practitioners.

The Modern Marketer's Guide to ABM was crafted to aid modern B2B marketers into establishing transformational ABM programmes...

Andre Yee
CEO, Triblio



INTRODUCTION

Getting Started with ABM

In this eBook we will address the evolution of the B2B purchase journey and discuss the fundamentals of starting a successful ABM programme in our "Ready-Set-Go" framework. B2B sales and marketing is constantly evolving and adapting to new advances in technology, and following only the traditional lead generation model may not be the most efficient approach to generating pipeline.

ABM prioritises quality over quantity, so sales and marketing can allocate resources and time on high-fit, high-intent target accounts. When buyers show interest in your product early in the purchase journey, account-based technology can put these signals right at the fingertips of your marketing and sales organisations.

Ready?

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- ✓ *Design Multi-Channel Orchestration*

Go!

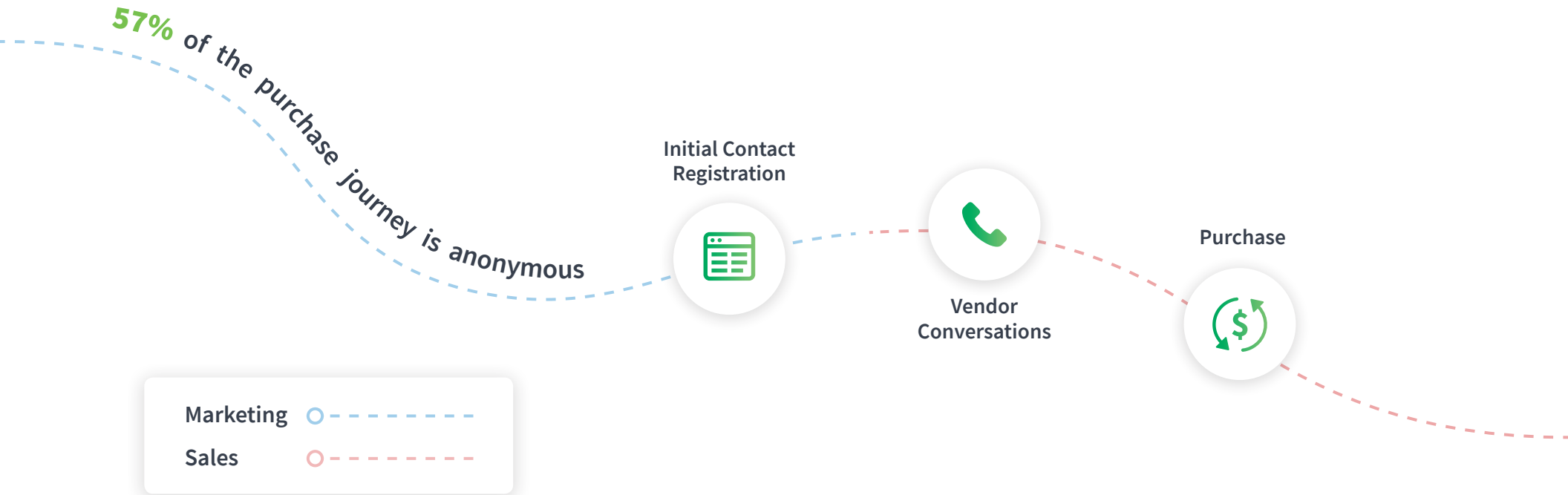
- ✓ *Execute ABM Campaigns*
- ✓ *Measure and Optimise Results*

The Broken State of Buyer Interactions

In traditional demand gen, marketing stops where sales start.

Some B2B marketers' still follow a traditional approach to demand generation. They have a single-minded focus on sparking form-fills, and after capturing enquiries, they nurture leads via email. When leads reach a certain activity score, marketing hands them off to sales, and it's completely up to sales to generate real opportunities.

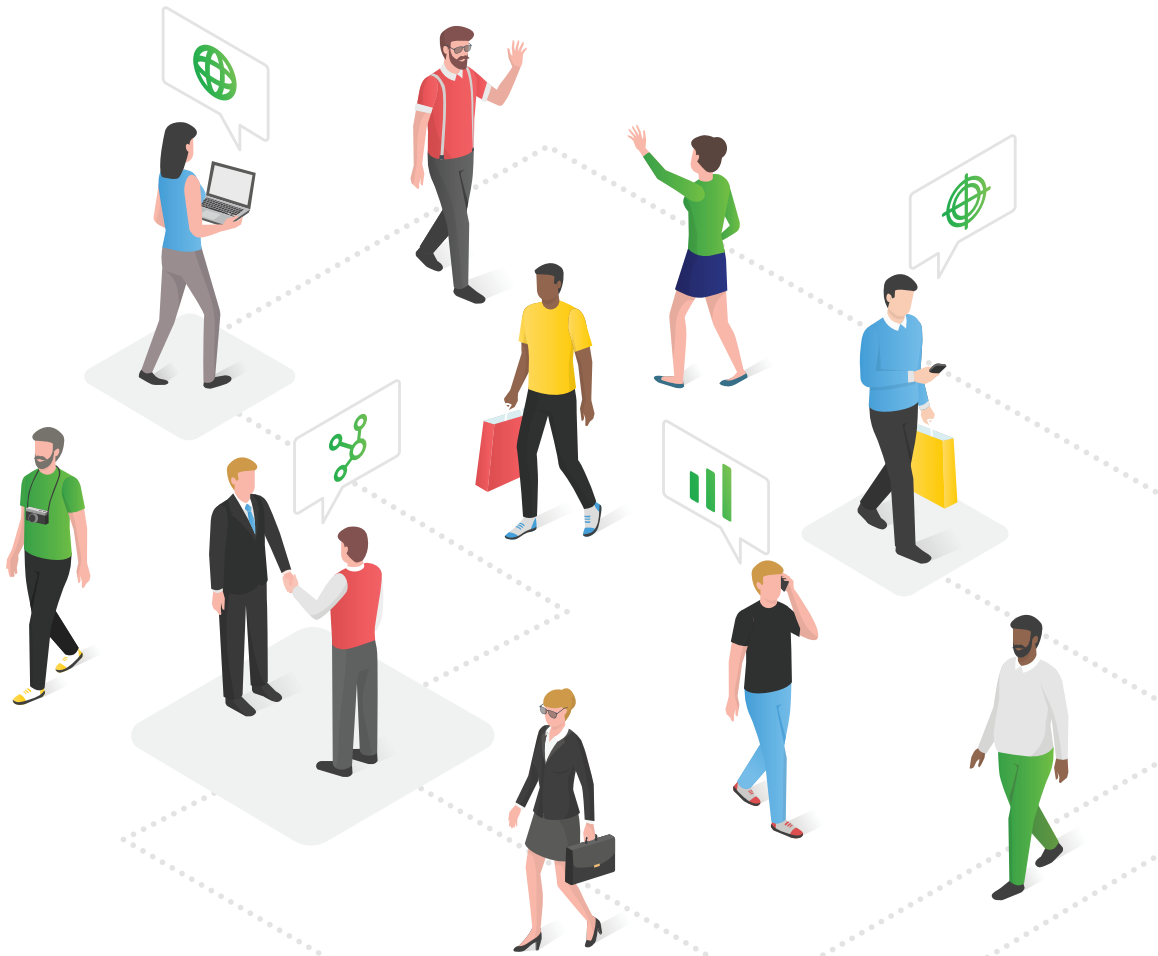
With 57% of the purchase journey remaining anonymous, vendors lack visibility into a huge repertoire of purchase-related activities. Marketers don't know where to focus their resources prior to contact registration, and sales can't tell when buyers are conducting research on the website.



Building Better Buyer Interactions with ABM

As a B2B marketer, you might ask:

- How do I influence buyers early?
- How do I measure the most valuable deals in the pipeline?
- How do I guide the entire purchase group towards reaching a consensus?

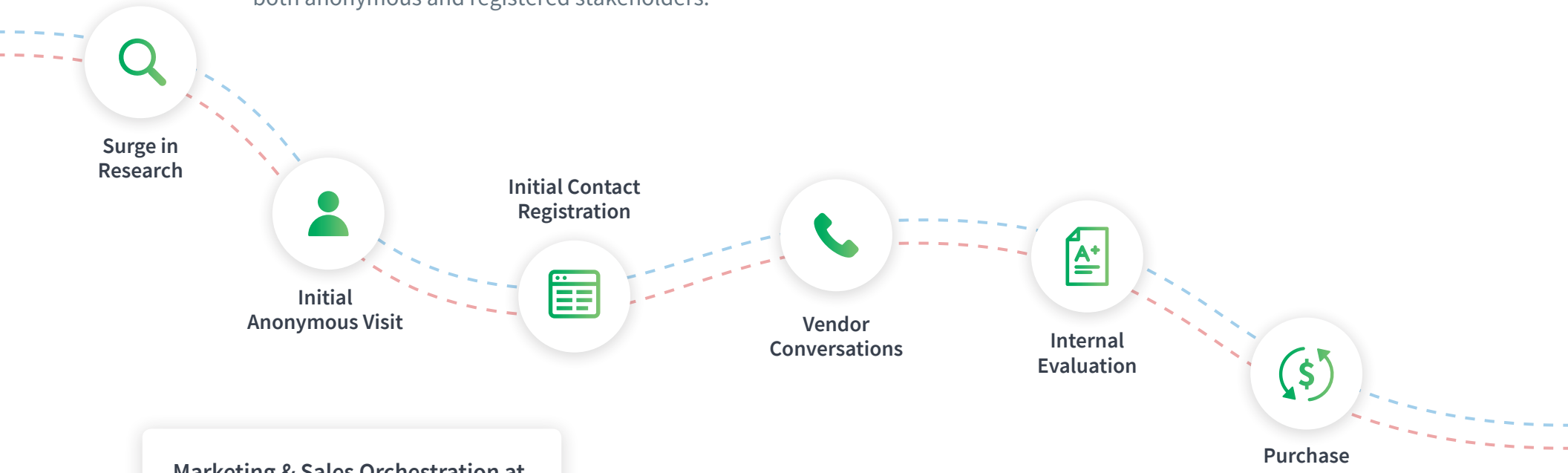


ABM & the B2B Purchase Journey

Account-based marketing orchestrates vendor interactions across the purchase journey to impact pipeline in target accounts.

Instead of waiting on form-fill completions, ABM marketers can jump ahead of the competition and shape buyer perception early in the purchase journey. Account-based insights give marketers visibility into target account purchase intent and engagement for both anonymous and registered stakeholders.

As soon as target stakeholders show a surge in interest in your category or hit your website, you can customise each subsequent digital interaction and trigger sales early. Consistent air coverage makes it more likely for buyers to engage with sales outbounding. Moreover, further reinforcement of key messaging during sales conversations gives your solution a solid position in the buyers' consideration set as both parties approach the purchase decision.



Marketing & Sales Orchestration at All Stages of the Purchase Journey

ABM by the Numbers

6.8

Stakeholders Involved per B2B Purchase

CEB, now Gartner

57%

of the Purchase Journey is Anonymous

CEB, now Gartner

6

Different Information Channels Consulted

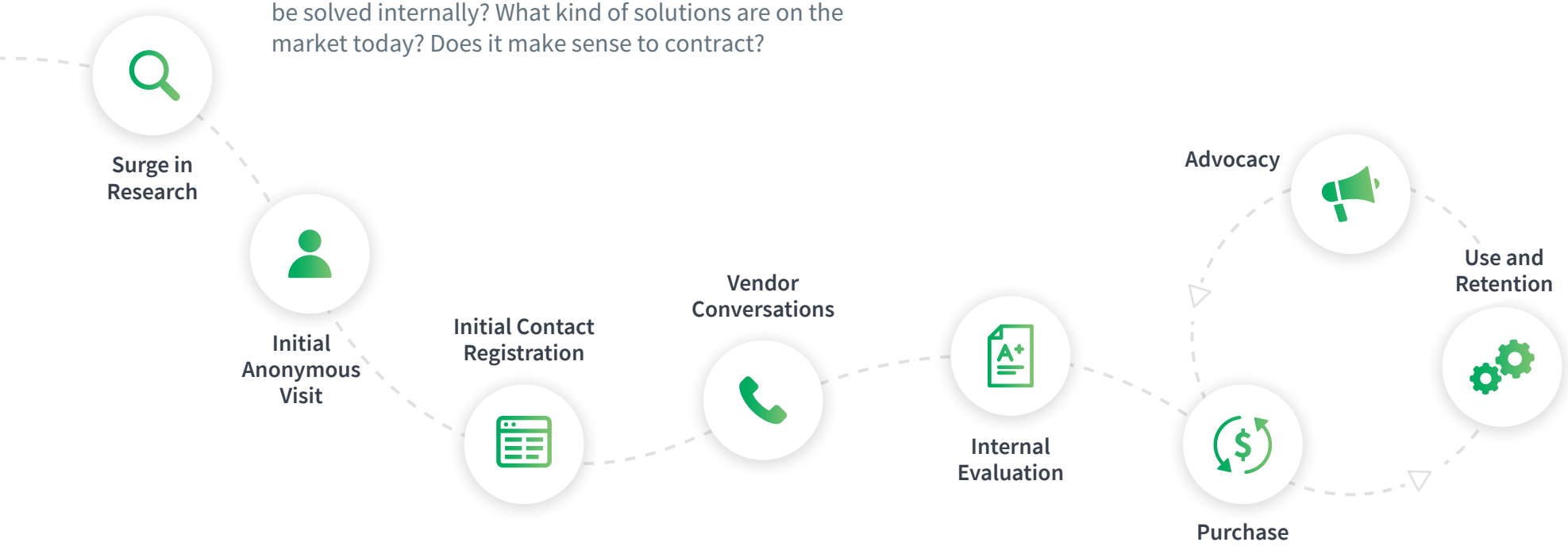
McKinsey & Company

Why this works with the modern B2B Purchase Journey

The modern B2B purchase journey is complex.

Today, B2B purchase decisions involve many stakeholders influenced by both traditional and digital marketing channels, the sales experience, simple word of mouth, and the list goes on. With big-ticket purchases, everyone's doing their due diligence, from the end-users to decision-makers; even C-suite executives may have a say. Early on, no one's quite sure what the solution should look like. Can their pain points be solved internally? What kind of solutions are on the market today? Does it make sense to contract?

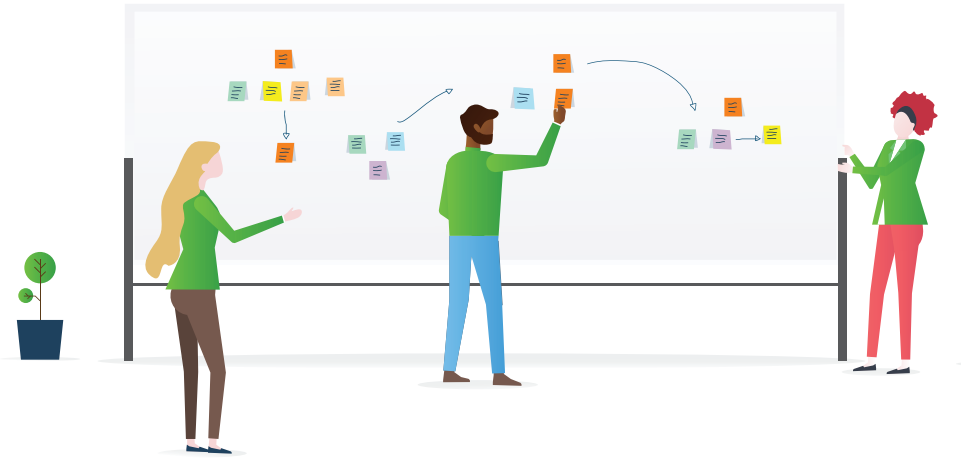
At some point, a buyer will fill out a form or call sales. Then the arduous process of internal evaluations begins, where buyers involve more expertise and new opinions. Finally, the purchase group makes a purchase decision, which may trigger a cycle of loyalty and further use.



The Modern Marketer's Guide to ABM

However, no purchase journey is exactly the same. At any moment, new information from any one of the channels could push buyers onto a different path. That's why having the right tools that automatically adjust to your buyer signals is critical in the modern B2B purchase journey. With valuable insights comes earlier interactions enabling you to nurture buyers through their journey. In return, you build lasting relationships and generate target account pipeline.

Triblio has supported thousands of ABM campaigns to help clients achieve award-winning results. This guide shares real client campaigns and distills their best practices into a battle-tested "Ready-Set-Go" framework. Learn how to choose the optimal level of personalisation, a convincing angle, and the right mix of channels for each target audience.



Ready?

- ✓ *Find Organisational Support*
- ✓ *Define Your Ideal Customer Profile*
- ✓ *Develop a Target Account List*
- ✓ *Assess Current Campaigns*

Set

- ✓ *Build Audience Segments*
- ✓ *Source Stakeholder Contacts*
- ✓ *Establish Account Metrics & Goals*
- ✓ *Design Multi-Channel Orchestration*

Go!

- ✓ *Execute ABM Campagins*
- ✓ *Measure and Optimise Results*

Ready?

The good news is that most B2B marketers are ready to get started with ABM today. ABM success doesn't require spotless data or perfect sales and marketing alignment. The following four checklist items are more than enough to prove organisational readiness.



- ✓ **Find Organisational Support**
  Is your organisation structured to support account-based objectives?
- ✓ **Define Your Ideal Customer Profile**
  Join forces with product and strategy to find addressable market segments.
- ✓ **Develop a Target Account List**
  Select target accounts to set a strong foundation for building ABM audiences.
- ✓ **Assess Current Campaigns**
  Evaluate current target account activity to benchmark a starting point for ABM initiatives.

Find Organisational Support

The ideal ABM programme garners company-wide input and backing, which can be a long, painstaking process. Luckily, B2B marketers can get started with small pockets of account-based support. Most marketers can spot at least a few signs of account-based organisation, for example:

1. Sales assigns different types of accounts to different reps.
2. Sales goes after a target account list.
3. Marketing triggers different marketing automation campaigns on firmographic fit or purchase journey stage. Customer success is asking for marketing help.
4. Customer success is asking marketing for help on growing account retention and advocacy.

In addition, your executives may already be setting account-based objectives. The following top-down initiatives show that your organisation should already be organised around accounts:

1. Your company reports on customer-centric financial metrics such as NPS, LTV, CAC, church, ROI, SOW.
2. Executives are asking to increase ASP or AOV, move upstream or upmarket, or focus on strategic segments.
3. Executives are involved in selling and closing.

If any of these statements are true for you, you have good reason to consider launching an ABM pilot.



Define Your Ideal Customer Profile

Another sign for organisational readiness is the presence of an ideal customer profile (ICP). While ICPs originate in the strategy department, a well-developed ICP makes its way into various interdepartmental operations.

Why does ABM require an ICP?

Every ABM campaign starts with a list of strategic target accounts. To build this list, marketers should refer to their ICP, which defines the addressable market segments that gravitate towards their unique value proposition. Detailed in the ICP are important pieces of information such as target account personas, pain points, and the value proposition.

Don't have an ICP? Try these Discovery Questions.

ICP Discovery Questions

How would you describe your ideal account? It helps to list real examples.

- Industry
- Geography
- Size
- Budget

How would you describe your ideal persona?

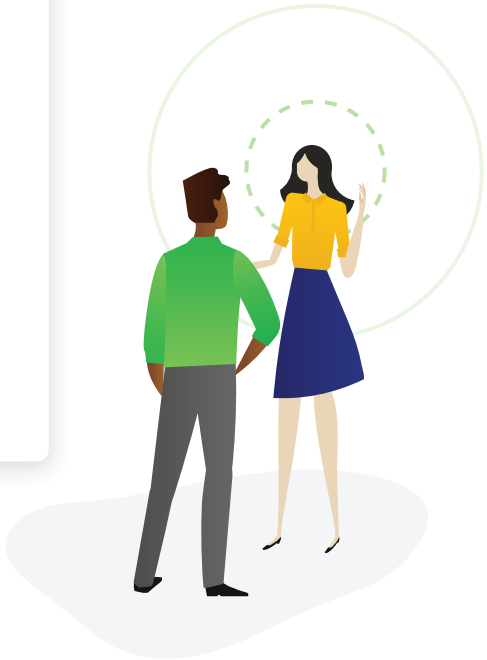
- Department
- Seniority
- Job Titles
- Responsibilities and Objectives

What are their key drivers?

- Pain Points
- Influencers
- Channels
- Timing

What's your value proposition?

See full template in Appendix A.



Develop a Target Account List

Which target accounts should you go after?

ABM programmes can get results with almost any list of target accounts.

However, the best source for target accounts depends on each organisation's business objectives and marketing goals. Think also about the parts of the organisation you'll need to work with to coordinate ABM campaigns.

Consider these tips:

- When targeting prospects, begin with a list created by sales and then obtain a sign-off from the strategy team.
- When targeting customers, ask client success for a list of strategic accounts for upsell, cross-sell and advocacy.
- If ABM aims to improve existing demand generation campaigns, start with account lists from marketing automation.
- Still struggling to put together a list? Find accounts based on a firmographic profile of customers or hire a vendor for propensity modelling.

Don’t have a target account list? Try these sources.

Sales — New logos, former clients, closed-lost accounts

Client Success — Accounts ready for upsell, cross-sell

Finance — Top customers

Marketing Automation — Segments and lists with high response rates

Propensity Modelling — Likely high win rates from statistical analysis

Customer Look-alike — Prospective accounts that share the same firmographics as your customers

Competitor's Clients

Executive Connections

Assess Current Campaigns

How well do current campaigns reach target accounts?

Before getting started with ABM, it helps to assess how target accounts perform under existing marketing and sales campaigns. Are your campaigns reaching key stakeholders and growing pipeline for strategic account segments?

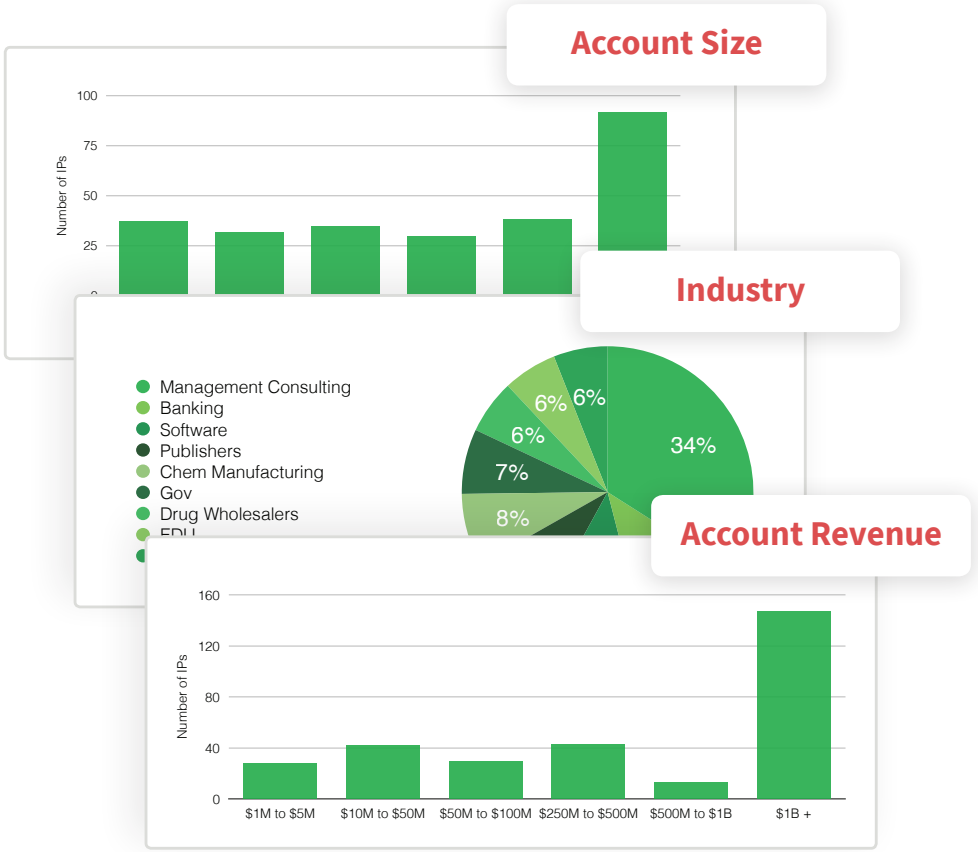
Given a historic benchmark for target account activity, marketers can make informed decisions around which campaigns to keep, optimise for ABM, or ditch completely. If you're not sure where to start, we've created a **benchmarking worksheet in Appendix E.**

For marketers who aren't sure how to set up account metrics, ABM technology vendors like Triblio offer tools that analyse current account activity for free.

Get a Free Benchmark Report

Talk to an expert at Triblio to learn more about your target accounts today.

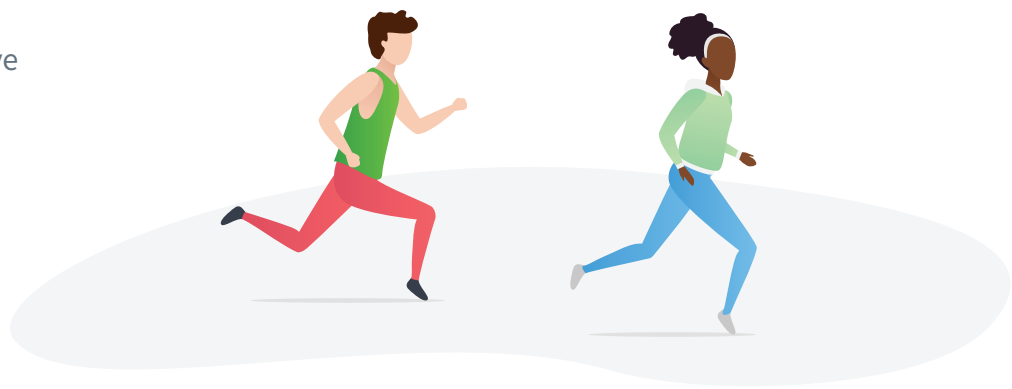
Request Report



Set Up and Launch ABM Campaigns in 30 Days

Organisational support, an ICP, a target account list, and account activity benchmarks establish a firm foundation for ABM success. Once B2B marketers have checked all the boxes for ABM readiness, they can launch ABM campaigns and generate results in less than 30 days.

The next two sections will walk you through how to properly set up and execute multi-channel ABM campaigns. We'll explain the essentials and pull from real client examples, so you too will be equipped to drive pipeline impact with ABM.



0-30 DAYS

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- ✓ *Design Multi-Channel Orchestration*

Go!

- ✓ *Execute ABM Campaigns*
- ✓ *Measure and Optimise Results*

Set

When an organisation is ready for ABM, the next step is to prepare for launch. Follow these four listed steps to make sure you're setting yourself up for ABM success.



- **Build Audience Segments**
  Segment your target account list by account size and purchase stage.
- **Source Stakeholder Contacts**
  Add contact information to audience segments when possible.
- **Establish Account Metrics & Goals**
  Set up metrics and goals at each stage of the purchase journey fore each audience segment.
- **Design Multi-Channel Orchestration**
  Select best-fit campaign tactics for each account segment.

Build Audience Segments

All ABM campaigns begin with a target account audience. Audiences can range from one, to tens of thousands of accounts. The best business outcomes happen when marketers tier their master account list to build strategic audience segments.

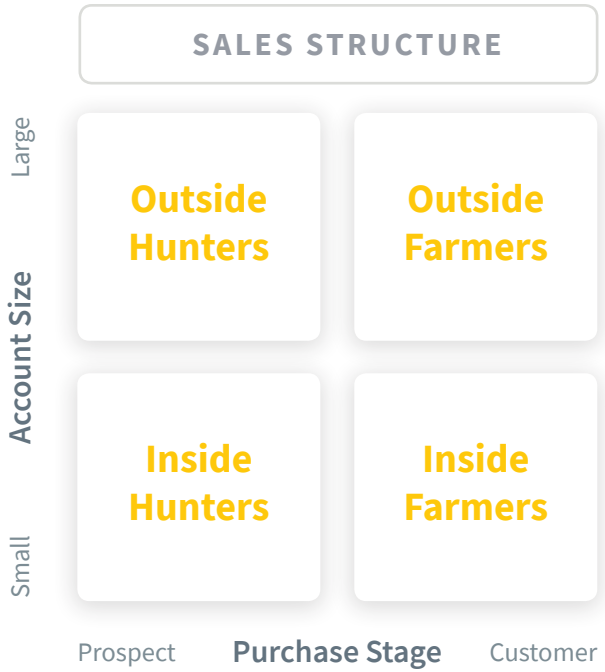
With proper ABM segmentation, marketers can optimise the level of personalisation, vary the mix of channels, and deliver uniquely compelling calls-to-action for each target account audience.

What are the rules for ABM segmentation?

Across marketing, sales, and strategy, there are number of ways to segment target accounts. Common segmentation schemes in marketing include product need, industry, and geography-based segmentation.

Sales almost always segments by account size and purchase stage.* Quota-carrying sales makers are strategically organised to address the unique needs of each type of account. Teams with different focuses go by different names. The chart on the right helps visualise this age-old sales structure.

The best practice in ABM is to mirror sales segmentation.



In a classic sales organisation, hunters sell to new prospects, while farmers sell to existing customers. Outside sales executives focus on strategic enterprise accounts, while inside sales reps outbound to a large number of small accounts.

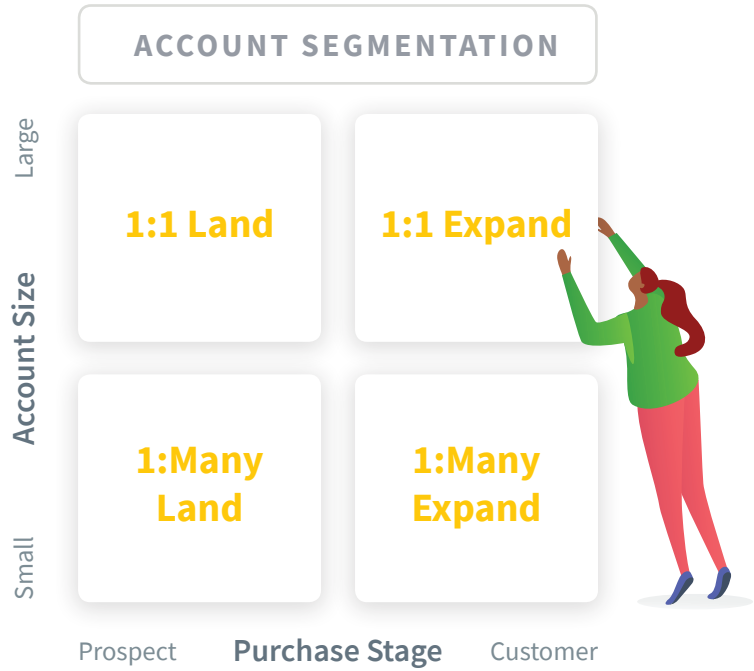
*Purchase stage in this guide is synonymous to customer lifecycle stage, share of wallet relative to competitors, purchase history, and level of engagement.

Build Audience Segments *continued*

Rule of Thumb: Segment by Account Size and Purchase Stage

When marketers segment how sales is structured, the two teams sync up on how they approach each unique set of accounts. Both teams are set up to cater to different content needs at the right level of personalisation.

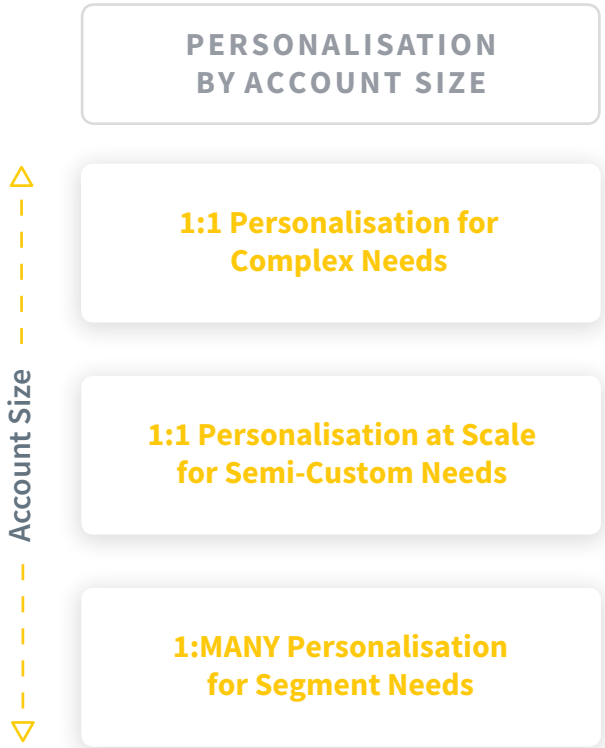
This model for account segmentation enables marketers to help land large prospects and expand within large customers with one-to-one account personalisation. They can also roll back resources and scale one-to-many personalisation tactics to land and expand smaller accounts.



Build Audience Segments

continued





Why Segment by Account Size?

Instead of the average 6.8 stakeholders per purchase, enterprise sales can involve 17 or more stakeholders, according to IDG. The larger the account, the higher the expectation for personal attention.

Large accounts require the most one-on-one attention. Each department follows its own purchase journey, and there are lots of buying centres with lots of stakeholders and complex needs. Large groups of stakeholders raise unique problems that require customised solutions. The only way for marketing to move the needle is through hyper-targeted campaigns.

Small accounts can be targeted in segments. With fewer stakeholders, they tend to make decisions quickly and require less personal attention. Marketers often scale one set of messaging and CTAs to reach tens of thousands of small accounts with similar needs.

Midsize accounts take on hybrid attributes. They have some custom needs but move quickly with fewer stakeholders. The ideal blend of ABM tactics scales personalised messaging, perhaps calling out a few custom needs for a certain target persona.

Build Audience Segments

continued

CONTENT NEEDS BY STAGE

Problem & Solution Discovery

Cost-Benefit Analysis

Product Usage & Expansion

Prospect ◁ – – – – – – – – – – – – – – – – – – **Purchase Stage** – – – – – – – – – – – – – – – – – – ▷ Customer

Why segment by purchase stage?

Prospects early in the purchase journey are still defining their problem and discovering possible solutions. Vendors must do what they can to spread awareness and win share of mind. Insights into account activity make it easier for marketers to accurately appeal to buyer needs.

In pipeline, prospects are assessing the capabilities of specific solutions. Buyers are talking to sales to break down the costs, benefits, and expected ROI. Vendors stand out when they push a clear value-proposition and drive consensus.

Customers seek advice on how to optimise the solution to meet their needs. They look to vendors for best practices. Marketers reinforce positive user experiences and promotes advocacy to help win more business.

Source Stakeholder Contacts

Sourcing stakeholder contacts is the final step to building an ABM audience. While account selection and segmentation are essential components to ABM success, campaigns won't work until they target real people.

How do you find addressable stakeholders in your target segments?

Marketers have a number of options for sourcing stakeholder contracts. First party systems of record such as marketing automation and CRM are a good place to start. Marketers can also look to third party data, buying lists from contact vendors or participating in lead programmes, for example content syndication. Oftentimes, sponsoring events comes with a list of contacts. In addition, ABM vendors like Triblio have their own learning engines that enable marketers to reach stakeholders within their account segments.

If you're building your own list, a good rule to go by is to gather as many contacts per account as the number of stakeholders involved in a purchase. For example, if there are ten stakeholders involved in a purchase decision, then aim for ten contacts per account.

Gathering clean data is often overwhelming, but don't let imperfect data stop you from going account-based. Most marketers can launch ABM campaigns using the first party data they already have. Rather than get bogged down, it's better to move forward, get results, and work on data hygiene simultaneously.

What about lead-to-account (L2A) mapping?

L2A groups contacts and leads into the right accounts. It helps route leads to their accounts. Since data hygiene is often difficult to secure budget for, many marketers will first launch ABM campaigns. Then, they'll use initial signs of ABM success to secure budget for L2A technology.

Establish Account Goals & Metrics

To run a successful ABM programme, marketers need to set goals and metrics for each target audience. Reporting for both marketing and sales must be, at its core, account-based.

Why are account metrics essential to ABM success?

ABM metrics track known and unknown stakeholder behaviour for all marketing and sales interactions across the purchase journey. These metrics report on micro business outcomes, such as lift in target account traffic, that act as leading indicators for pipeline and revenue. By measuring what matters, marketers can optimise campaign impact in each audience segment.



KEY METRICS

Demand Gen by Account

Measure lift in target account engagement with channels such as email, web, and display-ads

Pipeline Creation

Measure growth in the percent of in-target opportunities created

Pipeline Influence

Measure growth in the percent of in-target deals closed

For an expanded view & metrics worksheet, go to appendix C.

Establish Account Goals & Metrics

continued

Visualise Overall Target Account Progress

Successful account-based marketers don't just look at the impact of each campaign. They set up dashboards that track account progress across the purchase journey for each audience segment.

Here, data portability is key. Integrated programmes can combine information about target account activity to pipeline influence and revenue impact. In account-based organisations, this unified overview of pipeline progress becomes integral to marketing, sales, client success, and C-suite reporting. **Visit Appendix D to see dashboard templates from real clients.**

What else should I be tracking?

Besides measuring demand gen campaigns and pipeline influence by account, account-based metrics can also indicate buyer interest earlier in the purchase journey.

Marketers that set up purchase intent trackers and account scoring can keep tabs on surges in interest from potential customers, whether or not they're getting targeted by a current campaign. Account scores summarise the level of account activity in real time, which helps prioritise marketing spend and sales interactions.



Design Multi-Channel Orchestration

Different audiences have different patterns of behaviour. In response, marketers need to design ABM programmes that vary by audience. Marketers can achieve winning results for each segment with the right mix of personalisation, messaging, and channels.

Not sure how to get started? Try these 2 tips.

Tip 1: Start by assessing how each audience segment responds to existing channels and messaging. Revisit the target account assessment in Appendix E, but this time, measure how each segment responds to each channel.

Tip 2: It's also helpful to understand the basic concepts of the account funnel. The account funnel helps marketers design and track advanced ABM programmes. While ABM campaigns don't require full-funnel planning, marketers should incorporate key funnel concepts.



Design Multi-Channel Orchestration *continued*

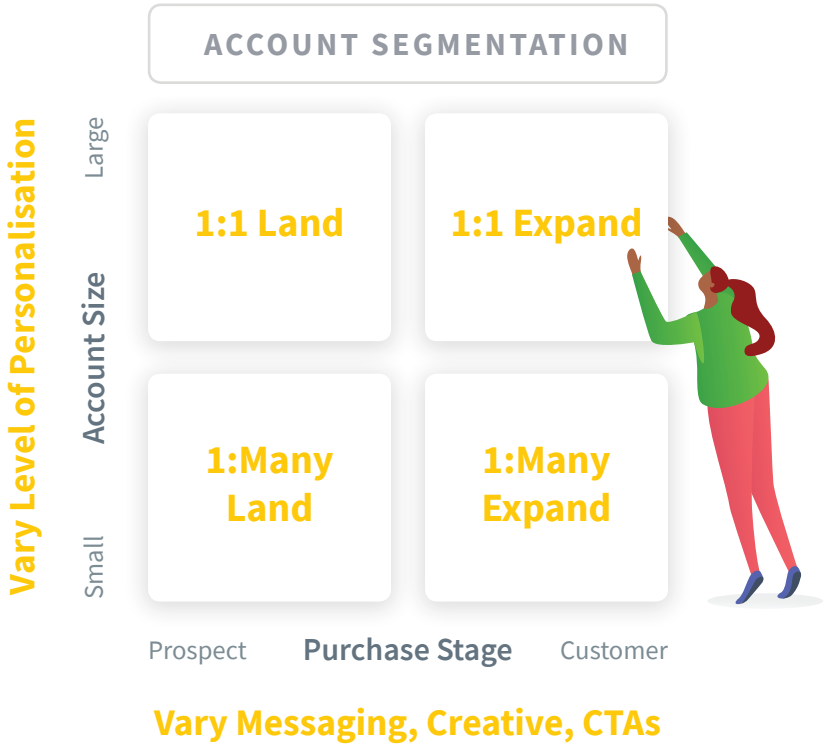
With a basic understanding of historically high-performing channels and the account funnel framework, it's time to flesh out your ABM campaign tactics for each segment. To plan best-fit campaigns, experiment with the three basic levers in ABM campaigns: level of personalisation, messaging, and channels mix.

Vary Level of Personalisation by Account Size

Approach larger accounts with 1:1 account targeting and heavy sales attention. For smaller accounts, scale 1:MANY segmented targeting to reach hundreds or thousands of like accounts.

Vary Messaging Across Purchase Stages

Land new leads and opportunities by engaging anonymous prospects early with specific stand-out solutions. For customers, vendors who have a proven track record already have their attention. Expand into these accounts by offering usage and optimisation advice.



Design Multi-Channel Orchestration *continued*

Synchronise Marketing and Sales Channels for ABM

Once you've decided on your channel mix for each segment, formulate a multi-channel ABM plan. One ABM campaign synchronises all the compelling channels for a specific target audience. The channels as described below are optimised for the account-based approach.

Account-based Advertising
Create B2B ad audiences that include known and unknown stakeholders from buying centres in target accounts. Marketers no longer need to hope stakeholders see their ad buys on media sites. ABM ads follow key stakeholders wherever they go.

Web Personalisation
Create dynamic web experiences by serving the most relevant messaging, offers, imagery, and content. Trigger dynamic personalisations upon recognising account profiles for both known and unknown visitors in target accounts.

Email
Group email communications by account instead of leads. Choose to execute email cadences from sales or marketing inboxes.

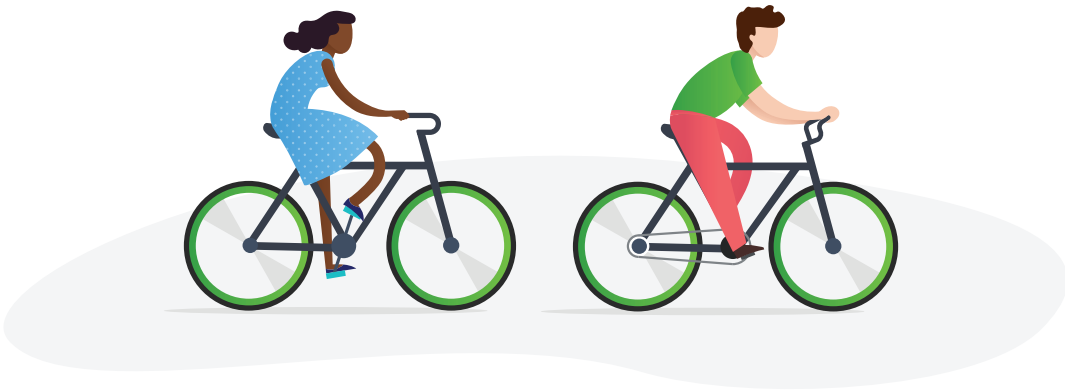
Sales Activation
Trigger sales involvement as soon as purchasers are interested instead of waiting until a lead is captured and scored. Support sales through all stages by reaching unknown stakeholders and creating consistent messaging across channels.

Direct Mail
Trigger personal, account-based direct mail campaigns with more focused spend per piece coordinated with sales activities. De-emphasise direct mail campaigns with high circulation and low returns.

Events
Focus time and spend to differentiate the experience for target accounts.

Time to Execute ABM Campaigns

At this point, marketers have a defined ICP. They've used this ICP to create a target account list. They've segmented this list by account size and purchase stage, so they can vary their campaign tactics for each segment. And finally, they've filled in stakeholder contacts to transform account segments into actionable campaign audiences. It's now time to execute revenue-generating ABM campaigns.



0-30 DAYS

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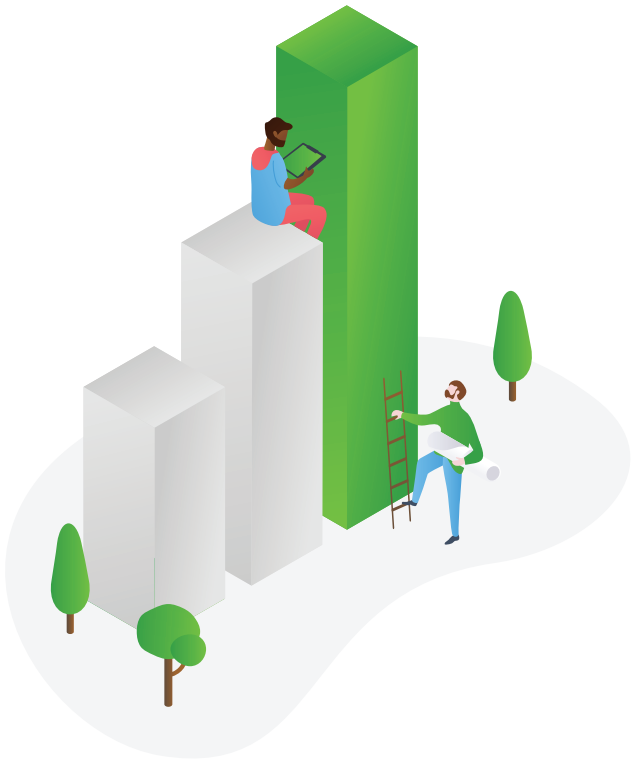
- ✓ *Build Audience Segments*
- ✓ *Source Stakeholder Contacts*
- ✓ *Establish Account Metrics & Goals*
- ✓ *Design Multi-Channel Orchestration*

Go!

- ✓ *Execute ABM Campaigns*
- ✓ *Measure and Optimise Results*

Go!

Optimal ABM execution varies from audience to audience. Triblio has helped execute thousands of ABM campaigns. Drawing from these campaigns, the following section highlights the best tactics for each account segment.



✓ **1:1 Land**
Activate sales early, and reinforce offers across the purchase journey to accelerate pipeline.

✓ **1:Many Land**
Land new leads and opportunities with account-based ads and web personalisation campaigns.

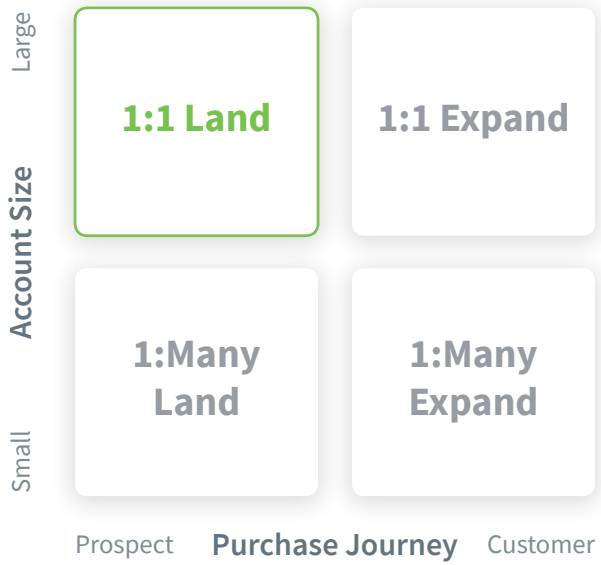
✓ **1:1 Expand**
Reach new departments, and support sales messaging with 1:1 air coverage.

✓ **1:Many Expand**
Cross-sell and upsell by engaging both contacts and hidden stakeholders.

Generate Revenue in Large Prospects

Win key accounts by activating sales early alongside multi-channel orchestration.

Large prospects want to purchase versatile and customised solutions that can solve their complex needs. Targeting large prospects requires a 1:1 approach with coordinated ABM campaigns and sales plays. To reach an optimal selection of tactics, marketers should look at where the prospects is along the purchase journey. The best campaigns feature a mix of traditional and new ABM tactics.



KEY TACTICS

Account Scoring

Leverage visibility into first and third party intent to activate sales at the point of interest.

Full Campaign Orchestration for Each Account

Design marketing and sales programmes with 1:1 account targeting so that every nurture campaign has a clear path to opportunity creation.

Multi-channel Air Cover for All Stakeholders

Reinforce benefits across the web for both known and unknown stakeholders to grow consensus within purchasing groups and accelerate pipeline.

Global Intent-based Ads Generating £3.5M in Pipeline

CASE STUDY | 1:1 LAND

Flexera
Inform IT. Transform IT.

Key Tactic

Leveraged first and third-party intent signals to run personalised ads to accounts with confirmed interest.



Challenge

Prior to account-based marketing, the marketing team struggled with allocating its limited budget across a large account list. In order to scale marketing's impact on pipeline growth, the marketing team knew it would need a more targeted approach to demand generation.

Solution

Equipped with Triblio's account visibility and personalisation capabilities, Flexera has been able to cater its messaging to a focused list of target accounts, thus engagement and moving the needle on pipeline.

> **"In using Triblio, we've seen a dramatic increase in the number of our named accounts that are actively engaged.**

Laura Wille
Manager Global Demand Generation

Watch Flexera's Customer Story →

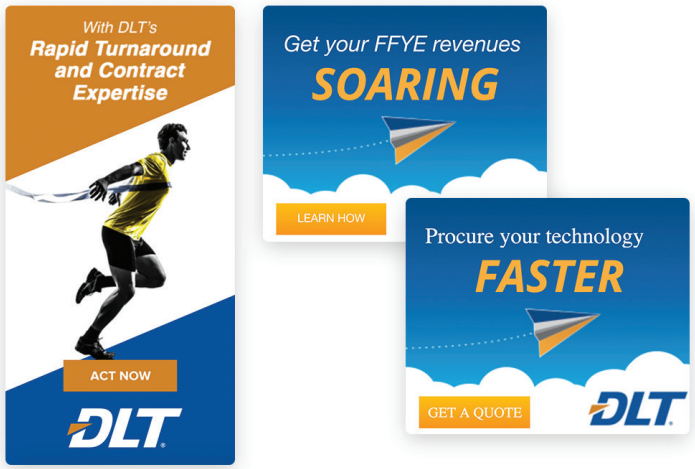
Purchase Journey Visibility Accelerates Pipeline

CASE STUDY | 1:1 LAND

DLT

Key Tactic

Segment target accounts and run a personalised ad strategy.



Challenge

DLT needed to develop a unified sales and marketing strategy to reach the right people at the right time with the right messaging. The team also wanted to know how to measure campaign success and then build off of that success.

> **We use Triblio and account-based marketing strategies and technologies to make sure we're in front of the right eyeballs at the right time**

Tom Mahoney
Director of Corporate & Marketing Operations

Solution

DLT used Triblio to segment accounts into three priority categories (tech companies, channel partners, end-users), then further segmented accounts based on location in the buyer's journey and engagement data.

This allowed DLT to nurture its target accounts through multiple channels with relevant content along each step of the purchase journey. The team now had the ability to measure the success of its strategies and update them accordingly in real-time.

Watch DLT's Customer Story →

Increase Opportunities in Small and Midsize Prospects

Open new opportunities with segment-specific offers at each stage of the purchase journey.

To target small and midsize prospects, scale ABM by targeting account segments. ABM technology plays a critical role in executing 1:MANY messaging, as it groups and targets thousands of accounts. ABM technology also recognises stakeholders at each of the various channels they consult along the purchase journey. This way, marketers can link those who don't click through search ads, display ads, or emails but end up visiting the website later.



KEY TACTICS

Persona-Targeted Display Advertising

Target specific decision makers and influencers within an account segment to keep your brand top of mind and encourage engagement.

Matched Web Messaging

Show dynamic web messaging that's consistent with the previous digital engagement to maximise the ROI on PPC and social campaigns.

Custom CTAs at Each Purchase Stage

Insert dynamic messaging on your website and pop-up cards to engage in-target stakeholders at each stage of the purchase journey.

Unifying Marketing & Sales with Triblio

CASE STUDY | 1:MANY LAND

ServicePower

Key Tactic

Coordinate marketing campaigns with BDR outreach to segmented account lists.



Challenge

ServicePower was facing a challenge in lead quality. Marketing found that neither vertical nor title-based campaigns drew enough accounts that fit within its ICP. Prospects tended to be too small or lacking in field operations. In order to move upstream and hit its target audience, ServicePower needed a more focused strategy.

> **"I like that Triblio continues to innovate by creating reports and tools that help me manage campaigns better and prove ROI.**
>
> **Kimberly Heuser**
> Director of Marketing & Operations

Solution

ServicePower pivoted to an account-based approach to revenue generation and selected a few hundred named accounts to launch evergreen campaigns. On the marketing side, campaign elements included emails, display advertising, LinkedIn advertising, website overlays, and website personalisation.

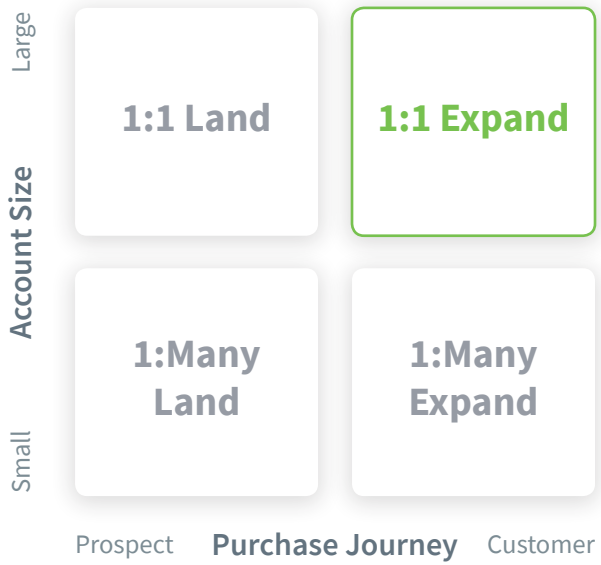
Simultaneously, the BDRs used traditional cold calling techniques, LinkedIn connection, and outreach email sequences to book meetings. Vertical segmentation allowed the marketing team to fully leverage its industry-specific thought leadership and build more personalised plays for the BDRs.

Read ServicePower Case Study →

Increase Cross-Sell & Upsell with Large Customers

Sell more product within top accounts supported by 1:1 air cover and sales insights.

Before ABM, most marketers would spread their activities across a number of channels to target their customer base. At best, they'd coordinate a few of these channels with sales activities to target specific accounts. But with ABM, marketing focuses on all its campaigns on reinforcing sales messaging to all stakeholders in customer accounts. These campaigns generate interest with hidden stakeholders, so marketers can activate sales earlier in the purchase journey.



KEY TACTICS

Air Cover in New Departments

Run targeted campaigns that reach key contacts and hidden stakeholders to support cross-sell opportunities.

Purchase Intent

Alert sales reps on account activity and content consumption in real time to quickly steer conversations towards reaching deals.

Consistent 1:1 Messaging

Design campaigns where sales and marketing create memorable customer interactions together to sell more product.

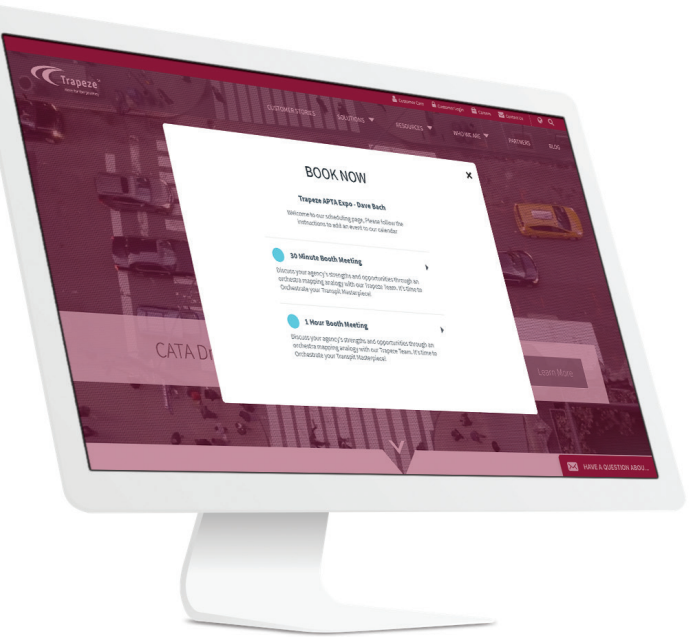
Purchase Journey Visibility Accelerates Pipeline

CASE STUDY | 1:1 EXPAND

Trapeze™

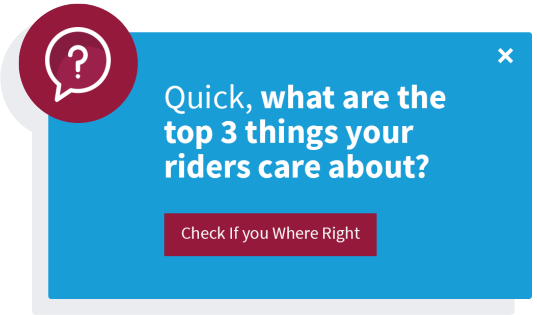
Key Tactic

Deep 1:1 account targeting for complete air cover



Challenge

Trapeze Group is a software and services provider for transportation agencies. Deals can reach several million dollars and require input from dozens of stakeholders. Trapeze's top 10 target accounts included a mix of prospects and customers.



Solution

Trapeze ran 1:1 account-targeted, multi-channel campaigns to engage key stakeholders in top tier accounts. At every interaction, messaging, imagery, and resources were completely customised to each account's geographic location, product use case, and sales representative. The goal of Trapeze's extensive air cover was to keep its brand top of mind and make it as easy as possible to book meetings. Both marketing and sales saw stronger conversions.

2018 Best ABM Campaign
Demand Gen Report →

APPENDIX



Appendix A. Building An Ideal Customer Profile

Developing your ICP requires organisational collaboration across marketing, sales, and customer success teams. This worksheet was created by Integrate, Heinz Marketing, and the B2B Marketing Academy.

Begin with analysing your best customers. What do they have in common? What corporate personas would benefit most from your solution? How does your product solve the different needs of different segments?

Targeted Account Types/Named Accounts	Targeted Personas	Responsibilities	Motivational Drivers	Pain Points	Value Propositions	Key Messages

Appendix B. Source Stakeholder Contacts

Precise contact data within your target accounts is essential to running customised ABM plays. Aim to have as many stakeholder contacts needed as there are stakeholders in the average purchase of your solution. You can get this number for assessing how many stakeholders were involved in previous purchases.

The table below asks for the number of contacts per account across your key data sources: CRM, Marketing Automation, Display Advertising Audience, Direct Mail. If you have other data sources, you can benchmark them with the same approach.

	Current			Goal		
	Small Account	Midsize Account	Large Account	Small Account	Midsize Account	Large Account
Aggregate (Total)						
CRM						
Marketing Automation						
Account-based Ad Audience						
Direct Mail						

Appendix C. Establish Account Metrics

Create account metrics to measure your ABM campaigns. First benchmark existing demand gen campaigns by measuring impact across the entire account instead of the impact on a single lead.

Once you execute your first ABM campaign, measure opportunity creation and influence by tracking the increase in created opportunities, closed-won accounts, pipeline and sales velocity, average deal size, and more.

Circle your objective from the following:

Leads	Pipeline Acceleration	Retention
Engagement	Upsell / Cross-Sell	Revenue Lift

The table below is a sample dashboard of recommended account metrics.

Measure Existing Demand Gen by Accounts	Opportunity Creation	Opportunity Influence
Email Metrics • CTR by Accounts • Opens by Accounts **Web Metrics** • Account Traffic • Account Session Duration • Content Interest by Account **Ad Metrics** • CTR by Accounts • Viewthroughs by Accounts • Account Impressions	**Measure the increase in:** • Created opportunities • Number of accounts engaged • Pipeline velocity • Response rate to sales outbounding • Meetings scheduled	**Measure the increase in:** • Closed-won accounts • Number of opportunities engaged • Sales velocity • Average deal size • New logos

Appendix D. Account Metrics Dashboard

Below is a metrics dashboard that one of our clients uses to track their target accounts as they move through the purchase journey. Feel free to use this template to track the numerical progression of your target accounts along the purchase journey and sales cycle stages.

	Prospect				Existing Customer				Grand Total
	Tier 1	Tier 2	Tier 3	Subtotal	Tier 1	Tier 2	Tier 3	Subtotal	
Unaware									
Aware									
Open Opportunity Aware									
Qualified Opportunity									
Grand Total									

Appendix E. Benchmark Current Campaign Channels

Assess how you apply your current marketing campaigns and tactics by account priority and size. You don't necessarily need to run the same tactics to your Tier 2 and 3 accounts as you do to your Tier 1 accounts.

Simply check off the box for each marketing tactic that corresponds with your current approach to the different account priorities.

On the next page, you'll find our suggestions taken from client best practices. Don't jump ahead before you fill out this worksheet yourself!

	Marketing Tactics by Account Size		
	Segment 1: _____	**Segment 2: _____**	**Segment 3: _____**
Account-based Ads			
Web Personalisation			
Microsites			
Sales Alerts			
Email Nurture			
Events			
Webinars			
Direct Mail			
SEM			

Appendix F. Group Account Segments

Now that you have segmented and prioritised your target account list, overlay your segments on the 2x2.

Keep it handy as a quick reference sheet when reading the client case studies in the Go section, so you can easily determine how you should design and organise your ABM campaigns.

It'll be helpful when reviewing the level of personalisation and information needed for each segment.

