Triblio

THE ESSENTIAL GUIDE TO ABM



Featuring Award-Winning Case Studies

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Introduction

The B2B purchase journey is complex. Vendors juggle on average 6.8 stakeholders per purchase, who consult 6 channels each and remain anonymous for most of the purchase journey.

As a vendor, you might ask:

- How do I reach anonymous stakeholders?
- How do I help stakeholders reach a consensus?
- How do I deliver relevant messaging at each purchase stage?

ABM coordinates sales and marketing campaigns across all stages. Whether you're targeting 5 or 50,000 accounts, ABM can scale 1:1 account targeting for your organization.

Triblio has supported thousands of ABM campaigns to help clients achieve award-winning results. This guide shares real stories of successful ABM campaigns and distills the essentials into a battle-tested "Ready-Set-Go" framework. Learn how to choose the optimal level of personalization, messaging, and channels for each target audience.

READY?	SET	GO!
• Find Organizational Support • Define Your Ideal Customer Profile • Develop a Target Account List • Assess Current Campaigns	• Build Audience Segments • Source Stakeholder Contacts • Establish Account Metrics & Goals • Select ABM Campaign Tactics	• Execute ABM Campaigns • Measure and Optimize Results

With the right framework, you too can generate revenue with ABM.

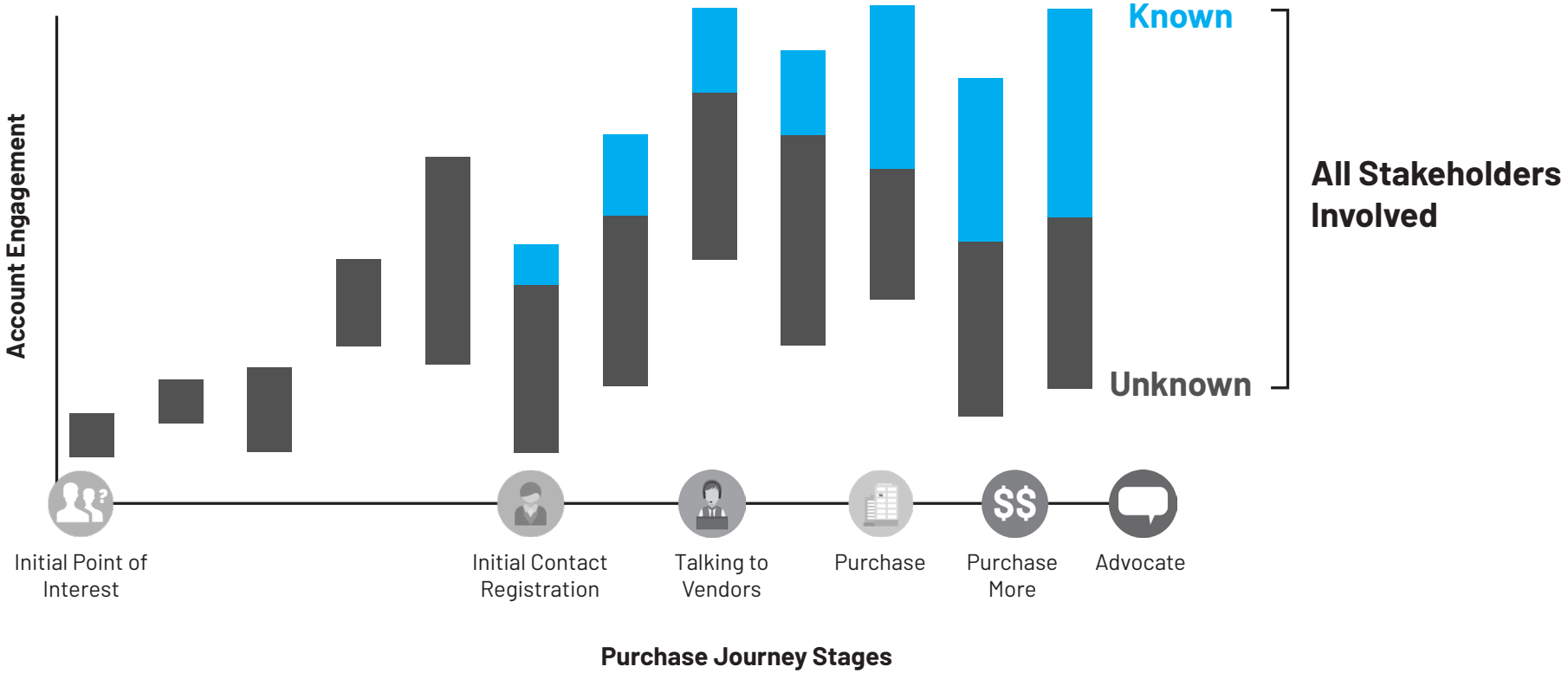


The B2B Purchase Journey

Multiple stakeholders conduct anonymous, multi-channel research.

The present-day B2B purchase journey is complex. At the initial point of interest, the first stakeholders anonymously conduct research on how to solve their company's pain point. As they progress, more stakeholders will join in the research and discussion. They'll interact with at least 6 channels and websites to explore possible solutions (McKinsey, 2015).

Eventually, some stakeholders may be enticed to complete a form and talk to sales. However, even when some stakeholders make themselves known to vendors, many still choose to remain hidden.



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**

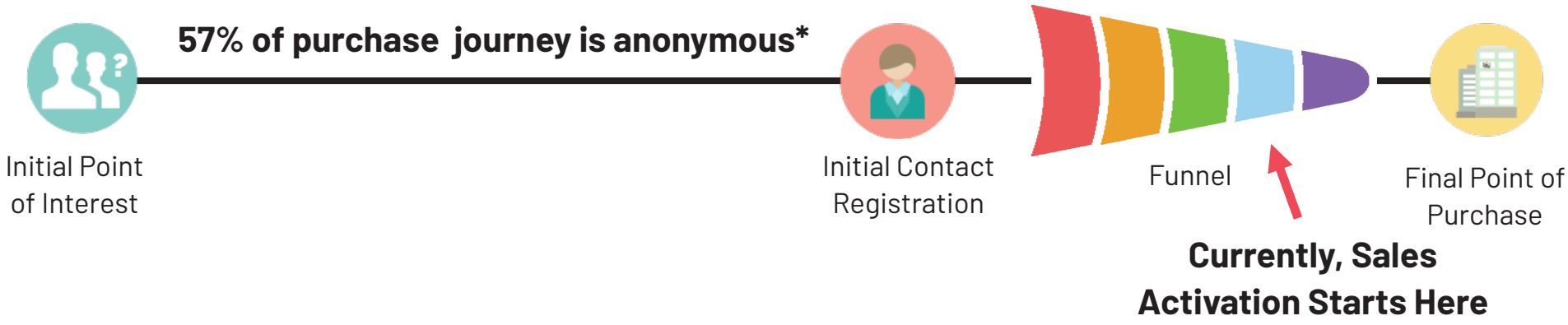
McKinsey & Company

The Current State of Vendor Interactions

Currently, most B2B marketers focus their resources and tactics on sparking form-fills or inquiries. After capturing inquiries, marketers nurture these leads with content via email. When lead activities reach a certain score, marketing hands them off to sales for follow-up.

Marketers face many challenges with lead generation:

1. Only use email to nurture and communicate with leads
2. Nurture individual stakeholders rather than all stakeholders in a buying center
3. May withhold target accounts because sales activation relies on lead scores.



Could there be a better way to interact with buyers?



*Source: CEB, now Gartner

ABM: Interact with Target Accounts Sooner

Account-based marketing coordinates marketing campaigns and sales plays across all stages to grow revenue in target accounts. As soon as target stakeholders indicate purchase interest on the website, vendors can customize their interactions. Instead of waiting for form-fill completions, vendors can jump ahead of the competition and immediately start to shape their purchase journeys.





Plex Systems: "World's Leading ABM Practitioner"

Plex runs a 100% account-based marketing program that has transformed their demand generation.
See page 40 for the full case study.

*TOPO, 3/17

The ABM Guide for Revenue Generation

ABM unifies inbound and outbound marketing with sales plays to grow revenue in target accounts. Marketers can execute ABM across all stages of the purchase journey for all types of accounts.

The challenge lies in deciding when to use which specific ABM tactics. Triblio has assisted thousands of ABM campaigns. Drawing from client success stories, this ebook presents a proven framework for revenue generation.

READY?

- Find Organizational 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
- Select ABM Campaign Tactics

GO!

- Execute ABM Campaigns
- Measure and Optimize Results

See proven ABM campaigns and client case studies!



READY?

Most B2B organizations are just about ready to get started with ABM campaigns. To check for organizational readiness, we find that the following preliminary steps are foundational to ABM success:

☐ Find Organizational Support

Is your organization 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

Gather target accounts from different departments like marketing, sales, etc. These accounts set the foundation for building ABM campaign audiences.

☐ Assess Current Campaigns

Evaluate how target accounts respond to current campaigns to see where you should go with new ABM initiatives.



Find Organizational Support

Do you see existing signs of account-based organization?

The ideal ABM program garners company-wide input and support, which can be a long, painstaking process. Luckily, B2B marketers can get started with small pockets of account-based organization. Most marketers can spot at least a few signs of account-based organization within their companies today.

1. Sales assigns accounts to different reps.
2. Sales has a target account list, such as new logos.
3. Marketing creates marketing automation campaigns by firmographics or purchase journey.
4. Customer success is asking for marketing help.

In addition, your executives may already be setting account-based objectives. The following objectives show that your organization should already be organizing around accounts.

1. Your company uses customer-centric financial metrics e.g. NPS, LTV, CAC, churn, 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.

Define Your Ideal Customer Profile

Another sign for organizational readiness is having an ideal customer profile (ICP). The ICP usually originates in strategy, but organizations with developed ICPs manage to work this profile into various interdepartmental operations.

Why do you need an ICP for ABM?

Every ABM campaign starts with a list of strategic target accounts or account segments. Marketers can use an ICP to help identify strategic segments, as it defines the addressable market segments that gravitate to their unique value proposition. Detailed in the ICP are important pieces of information such as target account personas, pain points, and value proposition. Don't have an ICP? Use one of our templates found in Appendix A.



- **Title**: Program Manager or above
- **Employee Size**: > 100
- **Pain Points**:
  - Need to meet strict quality government and OEM regulations
  - Manage and ensure consistent delivery of parts
- **Value Proposition**:
  - Reduce material costs
  - Improve quality to meet OEM

For an expanded view of an Ideal Customer Profile and a blank worksheet to use, see Appendix A.

Develop a Target Account List

How do you choose your target accounts?

ABM programs can work with any list of accounts.

The best source for target accounts depends on your organization's business objectives, marketing goals, and which part of the organization marketers 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.
- If ABM aims to improve existing demand generation campaigns, use 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 modeling.



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 Modeling:** Likely high win rates from statistical analysis
- **Customer Look-alike**: Prospects who "look like" your customers from a firmographic perspective
- **Competitor's Clients**
- **Executive Connections**

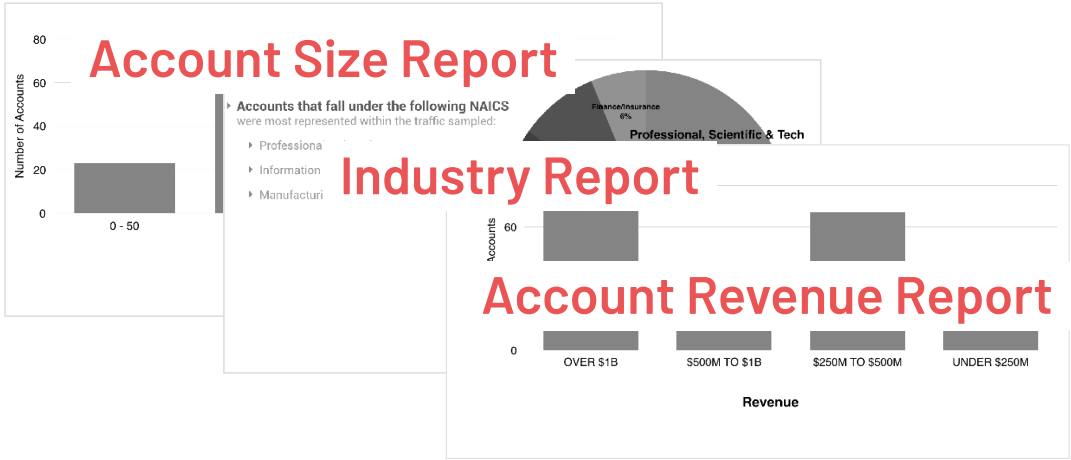
Assess Current Campaigns

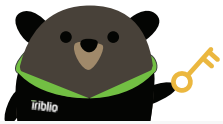
Do your current campaigns reach your target accounts?

Before getting started with ABM, benchmark current marketing and sales performance against your account-based objectives and target account list. Are your campaigns reaching key stakeholders and growing revenue in strategic account segments?

Given benchmark insights and recommendations, marketers can make informed decisions around which campaigns to stop, start, and optimize for ABM.

If marketers haven't yet bought technology to set up account metrics, ABM vendors like Triblio offer free tools that help marketers analyze the current status of target accounts for free.





Get a free benchmark report today

Visit www.triblio.com/request-demo

If you aren't meeting your target account objectives, try ABM! ABM focuses all campaigns on achieving pipeline impact and revenue growth. Set up and launch ABM campaigns in 30 days.

Set Up and Launch ABM Campaigns in 30 Days

Most organizations find that they're ready for ABM. They have a target account list, ICP, and supportive sales team. For organizations that are ready, ABM campaigns can generate results within 30 days.

The next two sections will walk you through how to properly launch and execute successful ABM campaigns.

READY?

- Find Organizational 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
- Select ABM Campaign Tactics

GO!

- Execute ABM Campaigns
- Measure and Optimize Results

0 – 90 days | **0 – 30 days**

SET

When an organization is ready for ABM, the next step is to prepare for launch. Set up ABM campaigns by defining:

☐ Build Audience Segments

Take your target account list and segment by account size and purchase stage.

☐ Source Stakeholder Contacts

Finishing building campaign audiences by appending stakeholder contacts.

☐ Establish Account Goals & Metrics

For each audience, set metrics and goals at each stage of the purchase journey.

☐ Select ABM Campaign Tactics

Plan different campaigns for each audience by varying these three basic levers: channel mix, level of personalization, and messaging.



Build Audience Segments

All ABM campaigns begin with a target audience. ABM campaigns result in the best business outcomes when marketers create audiences based on a segmented account list.

With strategic segments, marketers can vary their channel mix, level of personalization, messaging, and CTAs to optimize ABM for each audience.

What do ABM segments look like?

Across marketing, sales, and strategy, there are a number of ways to segment. Common marketing segmentation schemes include: product need, industry, and geographic location. Sales almost always segments by purchase stage and account size.

The best practice in ABM is to mirror sales segmentation.

SALES SEGMENTATION

Quota-carrying sales makers are strategically organized by purchase stage and account size to address different needs. Teams with different focuses go by different names:

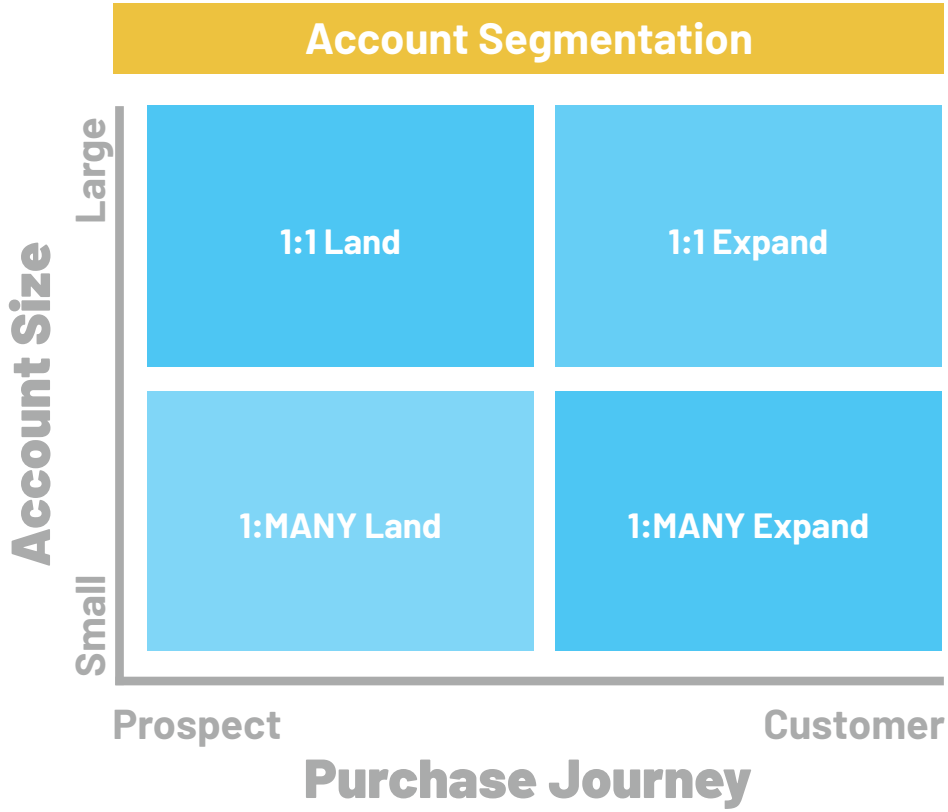
- Prospect: hunters, acquisition AEs, new sales
- Customers: farmers, account managers
- Large Accounts: enterprise, key accounts, outside, or field sales
- Small Accounts: Inside Sales



*Purchase journey stage can be otherwise known as lifecycle or share of wallet relative to competitors, purchase history, or level of engagement.

Segment By Account Size and Purchase Stage

When marketing segments mirror sales organization, marketers can likewise cater to different content needs at the right level of personalization. Larger accounts have custom needs and expect 1:1 personal attention, and at different stages o the purchase stage, stakeholders seek different types of information.





Clarabridge: Featured for its ABM segmentation that influenced $24M in pipeline

Clarabridge, a customer experience management software company, made its first attempt at ABM by advertising to a marketing-defined account list. However, the marketing team soon realized they could improve results by working with sales to define their target account segments. Together, they used web personalization with coordinated sales plays to influence $24m in revenue in Q1 2017. For more detail, see "Clarabridge Influences More Deals with Comprehensive Segmentation Strategy," published in Demand Gen Report's ABM in Action.

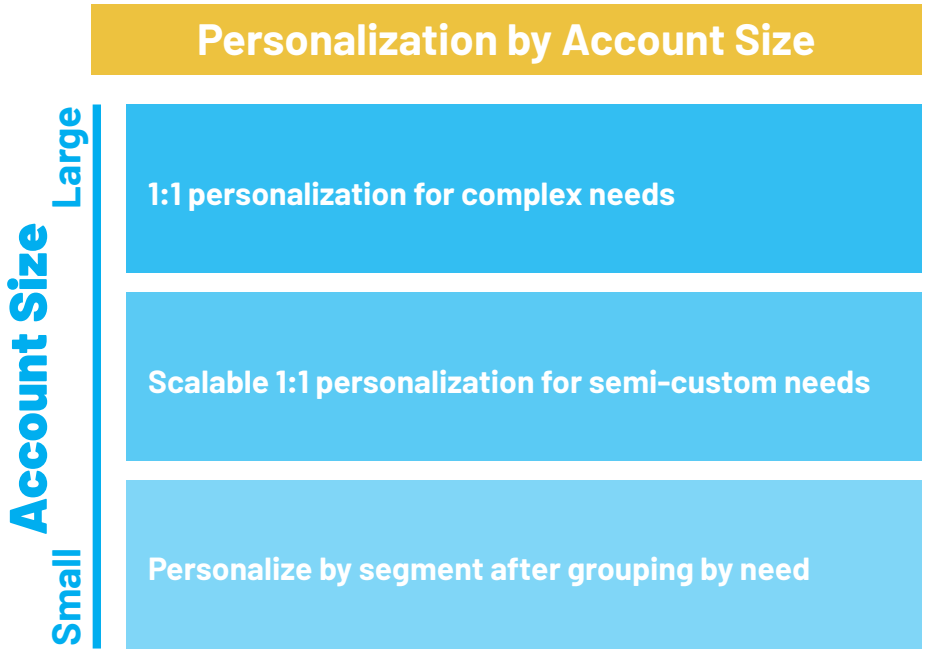
Why Segment by Account Size?

The larger the account, the higher the expectation for personal attention.

Large accounts are complicated. They have lots of buyer centers, lots of stakeholders, and complex needs. Large accounts have multiple purchase journeys in different departments. Instead of the average 6.8 stakeholders per purchase, B2B enterprise sales can involve 17 or more stakeholders (IDG, 2014). These stakeholders provide different perspectives to define unique problems and determine a customized solution. All this complexity requires a lot of personal attention.

Small accounts can be grouped into segments. Hundreds of thousands of small accounts can be organized into segments with similar needs. With fewer stakeholders, they tend to make quick decisions. ABM marketers often scale campaigns across multiple segments with customized messaging and CTAs to reach tens of thousands of small accounts.

Midsize accounts are a hybrid of small and large. They have some custom needs but can also make quick decisions because they have fewer stakeholders than large accounts. Scalable 1:1 personalization that blends ABM tactics for large and small accounts is ideal for midsize accounts.



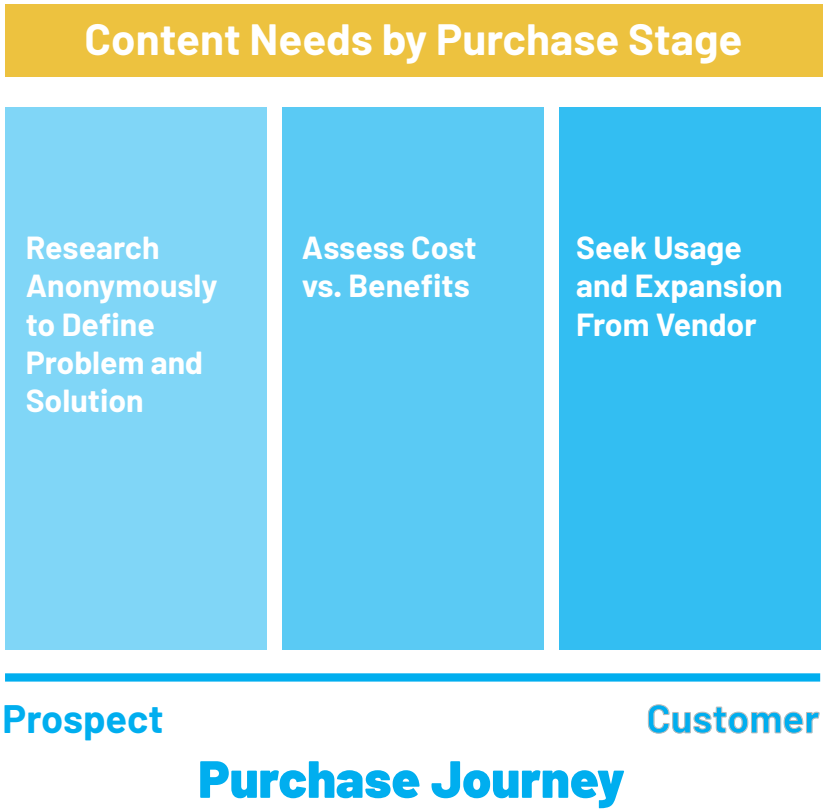
Why Segment by Purchase Stage?

Stakeholders seek different information from various sources along the purchase journey.*

Prospects at the beginning of their purchase journey seek to define their problem. They explore possible solutions while remaining anonymous to vendors. Vendors must quickly stand out, as anonymous stakeholders jump from one channel to another.

Prospects further along in the purchase journey talk to vendors to assess their specific capabilities. When stakeholders actively consider a purchase, they want to understand the costs, benefits, and ROI of that specific solution. Multiple stakeholders will provide their perspectives to justify the solution in favor. In turn, vendors must help drive consensus.

As customers, stakeholders seek advice for usage and expansion. They want to optimize the solution to meet their needs, so they seek advice from their vendors. Here, vendors have the opportunity to win more business.



*Source: Forrester

Source Stakeholder Contacts

Complete your audience build by finding key stakeholders in each audience segment.

How do you find addressable stakeholders in target segments?

Marketers can source stakeholder contacts from 1st party systems like CRM and marketing automation. They can append 1st party lists with 3rd party data from ABM or contact vendors. Add both target personas and qualified leads to ABM audiences.

Gathering good, clean data can be an overwhelming, never-ending process. Fortunately, most marketers can launch ABM campaigns using the data that they have.

As marketers get going with their ABM campaigns, they can continue to gather contacts for target accounts. Aim to gather as many contacts per account as the number of stakeholders required for that purchase. For example, if there are 10 stakeholders required per purchase, then aim for 10 contacts per account.

	Contacts per Account					
	Current			Goal		
	Small Account	Midsize Account	Large Account	Small Account	Midsize Account	Large Account
Account-based Ad Audience	0	1	0	5	10	20
Direct Mail	0	0	1	5	10	20

For an expanded view and metrics worksheet, go to Appendix B.

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

L2A groups contacts and leads into the right accounts. It helps route leads to their accounts and appends contact information. 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 program, marketers need to set goals and measures for the audience segments they're targeting. Reporting in 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 behavior for all marketing and sales touches across the purchase journey. These measures report on micro business outcomes that impact revenue for target accounts. By tracking the metrics that matter, organizations can optimize their marketing and sales operations for revenue generation in each audience segment.

Measure Existing Demand Gen by Accounts	Opportunity Creation	Opportunity Influence
Email Metrics • CTR by Accounts • Opens by Accounts • Content Interest by Account	Measure the increase in: • Created opportunities • Number of accounts engaged	Measure the increase in: • Closed-won accounts • Number of opportunities
Ad Metrics • CTR by Accounts • View-throughs by Accounts • Account Impressions		

For an expanded view and metrics worksheets, go to Appendix C.

Measure Segments Across the Purchase Journey

Successful account-based marketers set up dashboards that track account progress across the purchase journey for each audience segment. These dashboards present a unified overview of pipeline progress, useful for both marketers and sales makers. Visit Appendix D to see a real client dashboard.

	Prospect				Existing Customer				Grand Total
	Tier 1	Tier 2	Tier 3	Subtotal	Tier 1	Tier 2	Tier 3	Subtotal	
Unaware									
Grand Total									

For real client dashboards, go to Appendix D.

Measure each segment against your goals for a full-funnel view of ABM progress!



What about account scoring?

Account scores are computed based on account behavior and the importance of each account to your company. Account scoring helps prioritize marketing spend, campaigns, and sales interactions.

For more details, see the Essential Guide to the Account Funnel. Triblio recommends that marketers implement account scoring after executing successful ABM campaigns to optimize campaign performance.

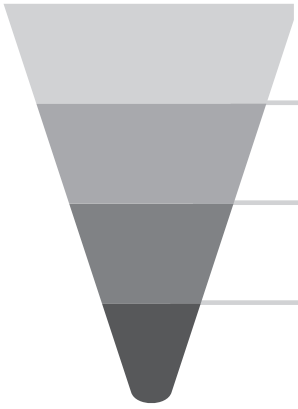
Select ABM Campaign Tactics

Difference audiences behave in different ways. In response, marketers need to vary their ABM plans. Achieve winning results for each segment with the right mix of personalization, messaging, and channels.

Which ABM tactics work best for each segment?

To plan best-fit ABM campaigns, start by assessing how each audience segment responds to existing channels and messaging. Marketers may choose an ABM technology for a detailed assessment or conduct a manual assessment using the worksheet on Appendix E.

In the planning process, it's also helpful to understand the basic concepts of the account funnel. The account funnel helps marketers design and track advanced ABM programs. While ABM campaigns don't require full-funnel planning, marketers should incorporate key funnel concepts.



FUNNEL STAGE	KEY CONCEPTS
Activate Interest	Execute ABM campaigns to activate interest for unknown stakeholders in target accounts.
Qualify Accounts	Trigger further marketing campaigns and sales plays based on account qualification and interest.
Opportunity	Accelerate pipeline by reaching known and unknown stakeholders. Support sales messaging across multiple channels.
Close	Win opportunities with coordinated sales and marketing campaigns.



Want to read more about the account funnel?

Check out our Essential Guide to the Account Funnel!

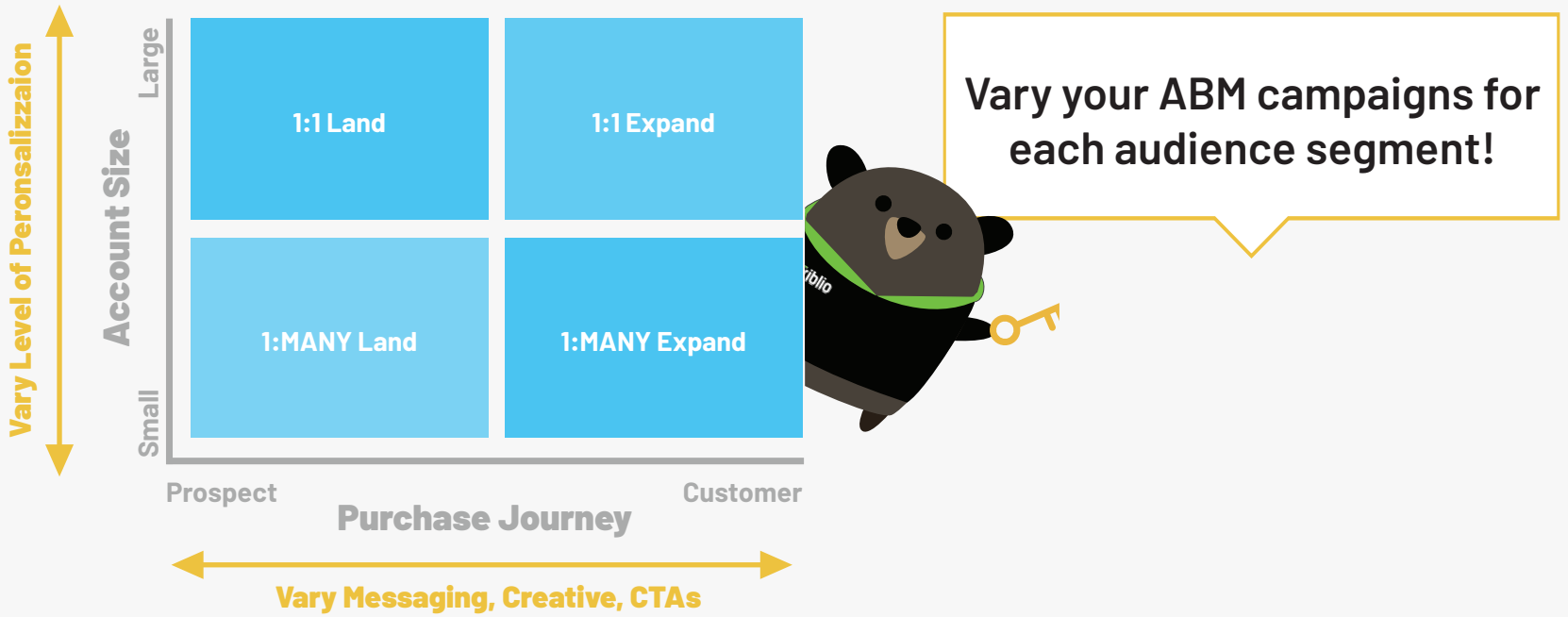
With a basic understanding of historically high-performing channels and the account funnel framework, it's time to flesh out your ABM campaign tactics for each segment. To plan best-fit campaigns, experiment with the three basic levers in ABM campaigns: level of personalization, messaging, and channels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

Vary Level of Personalization 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 optimization advice.



Synchronize 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 synchronizes all the compelling channels for a specific target audience. The channels as described below are optimized for the account-based approach.



Account-based Advertising
Create B2B ad audiences that include known and unknown stakeholders from buying centers 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.



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.



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



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



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



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.

READY?

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

SET

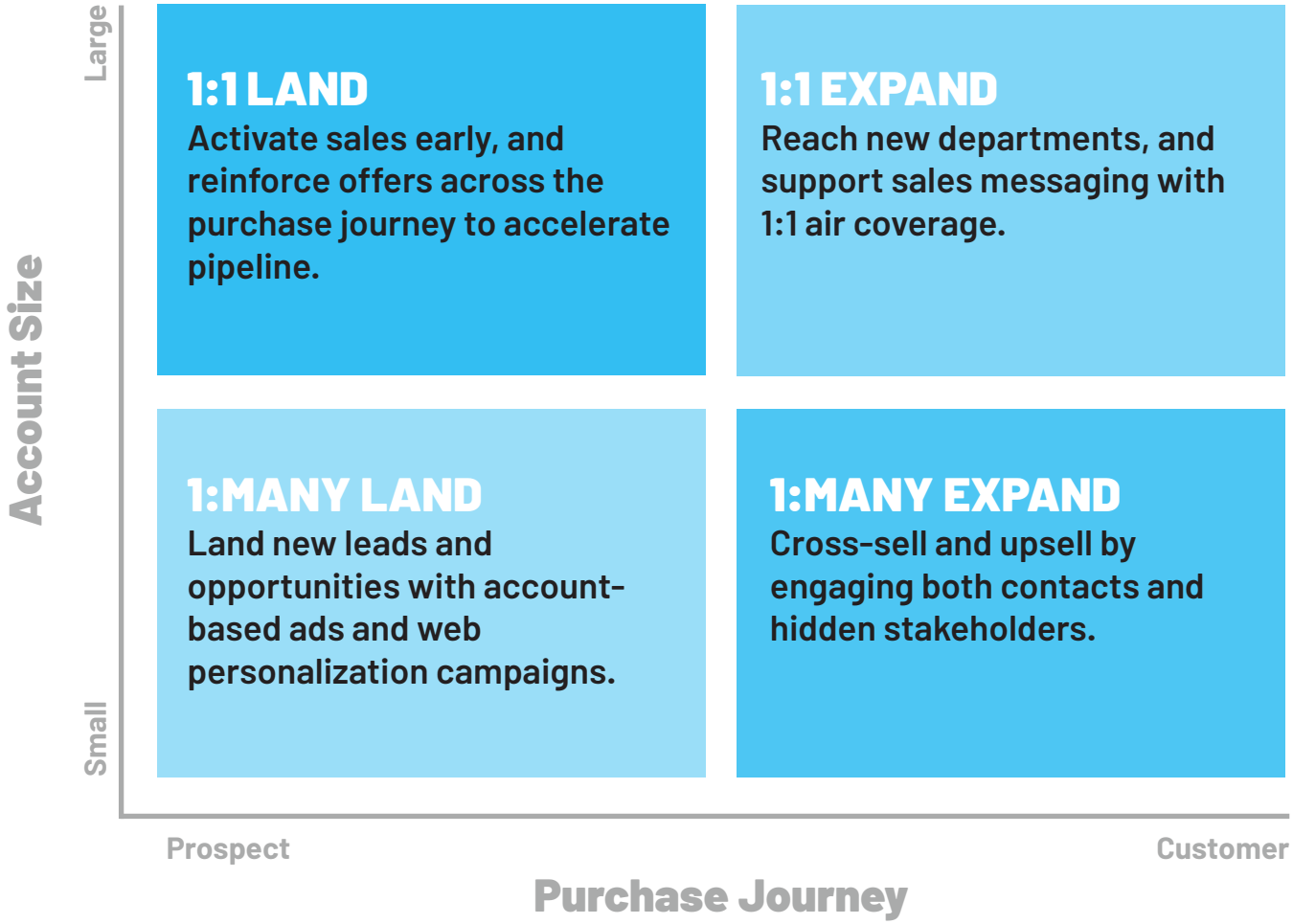
- Build Audience Segments
- Source Stakeholder Contacts
- Establish Account Metrics & Goals
- Select ABM Campaign Tactics

GO!

- Execute ABM Campaigns
- Measure and Optimize 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.



Generate Revenue in Large Prospects

Capture anonymous stakeholders in large prospect accounts with 1:1 personal attention.

Large prospects want to purchase versatile and customized 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 prospect is along the purchase journey. The best campaigns feature a mix of traditional and new ABM tactics.



Key Tactics:

Generate buyer interest to activate sales early

Leverage visibility into account activity, and activate sales as soon as an account reaches a certain engagement threshold. Utilize real-time account behavior and interest to optimize sales outbound messaging.

Create new pipeline with coordinated marketing and sales plays

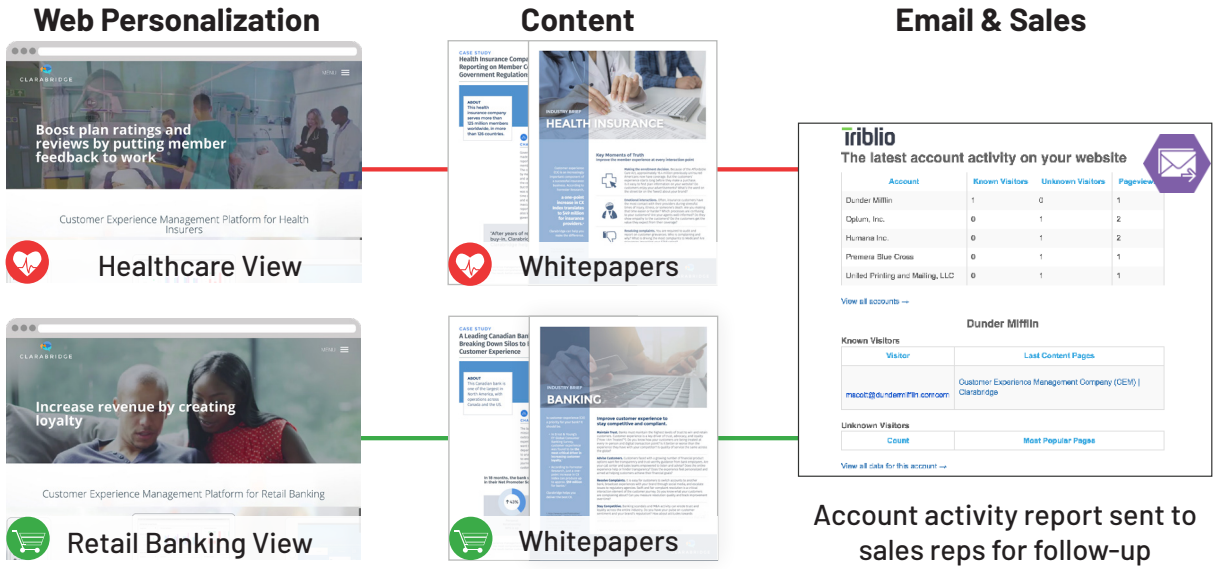
Personalize web and landing pages with 1:1 messaging, images, and resources for accounts early, even before sales opens an opportunity. Elevate awareness and mindshare with personalized account-based advertising.

Accelerate pipeline by reinforcing benefits to known and unknown stakeholders

To known and unknown stakeholders from accounts in RFP stage, reinforce product benefits with 1:1 account-based advertising and web personalization, in addition to email and direct mail.

Interest Buyers Early in the Purchase Journey

Score accounts to activate 1:1 sales plays



Clarabridge, a $50M customer experience management software company, wanted to penetrate into enterprise accounts. Its marketing team found that account-based advertising and other campaigns could generate traffic to the website, but they weren't converting that interest into opportunities.

To nudge target account traffic further along the purchase journey, they turned to web personalization and sales activation. On their website, they now personalize both known and anonymous visitors' digital experiences by addressing relevant needs by account.

When they see anonymous engagement from target accounts, they have enough information to activate sales early. At the point of anonymous interest, they trigger 1:1 account-personalized sales plays. These are best-fit campaigns, where SDRs communicate how Clarabridge can solve account-specific pain points.

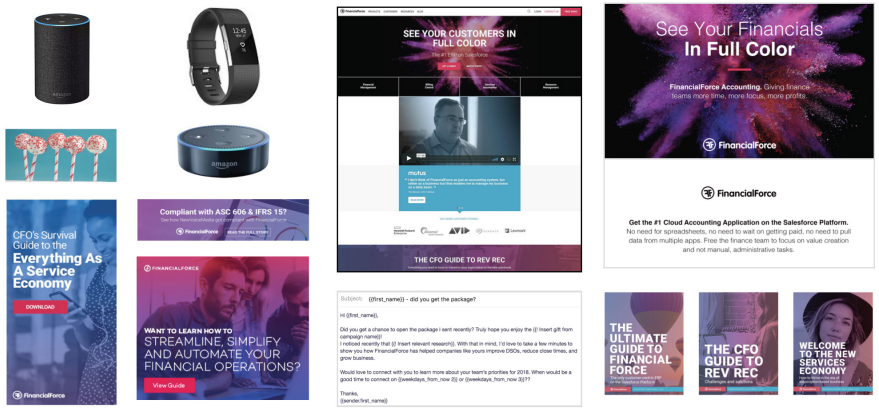
CLARABRIDGE

Influenced $24m in pipeline in Q1

Rapidly Generate Pipeline at Scale

Coordinate 1:1 sales and marketing campaigns

Multichannel campaign across direct mail, ads, web, and sales channels



FinancialForce is a cloud ERP solution initially financed by Salesforce. Its ERP is customized for many different use cases. At FinancialForce, each sales maker manages thirty Priority 1 acquisition prospects. These target accounts were selected for their size and complexity. Prior to running an ABM program, marketing would send gifts to Priority 1 prospects after they took a meeting, which would trigger inbound sales opportunities.

Realizing this was essentially a lead gen tactic, FinancialForce switched gears. They planned and launched a new ABM campaign. FinancialForce's new campaign still involves sending gifts to priority accounts, but it also coordinates a series of other marketing touches and sales plays.

FinancialForce runs account-based advertising for air cover to known and unknown stakeholders within an account, drives all stakeholders to unique microsites that focus on how FinancialForce can solve their account's unique needs, and activates sales outbounding via email.

FINANCIALFORCE

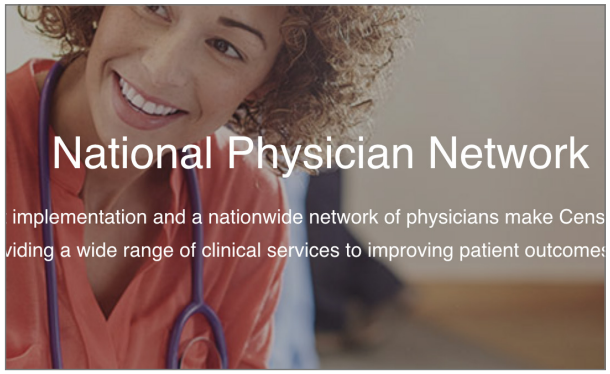
"Generated millions in pipeline"

Accelerate Close Rates in Large Accounts

Message to known and unknown stakeholders at all purchase stages

"View Through" Web Personalization





Ads targeted to specific contacts in accounts in RFP stage

"View through" web traffic are visitors who saw the ad and then visited the website without "clicking through"

With ABM vendors like Triblio, marketers can reach more known and anonymous stakeholders more frequently to accelerate prospects who are already in pipeline. Marketers can use 1:1 account-based advertising and web personalization to align digital marketing campaigns with sales messaging. These ABM campaigns complement email, direct mail, and events at a lower cost, and encompass all stakeholders within target accounts.

CenseoHealth, a $200M health assessment provider, uses 1:1 account-based advertising and web personalization to target both known and unknown decision makers. Its new ABM campaigns boost brand awareness and promote industry expertise while complementing existing marketing campaigns.

CENSEOHEALTH®

"Notable increase in booking rates"

Increase Opportunities in Small and Midsize Prospects

Reach anonymous stakeholders with 1:MANY multichannel campaigns.

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 recognizes 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:

Increase engagement and leads with account-based ads and web personalization

Account-based advertising targets specific stakeholders in target accounts. Display ad impressions drive stakeholders in target accounts to the website to increase account engagement. When marketers then personalize the website with relevant messaging, conversions increase.

Increase new opportunities by personalizing CTAs by account segment

Personalize web and landing pages to answer the specific needs of target account segments. Dynamically customize messaging and imagery to match segment needs for more qualified conversions and increased opportunities.

Personalize websites to match PPC and Facebook ad campaigns

Buyers of all sizes are taking longer to fill out forms. Triblio's research estimates a 90-day lapse between a visitor's first visit and form submission. To maximize the ROI for social and PPC campaigns, personalize the website by the digital marketing campaign they last saw to achieve consistent messaging across all channels for each segment.

Increase Opportunities in Target Industries

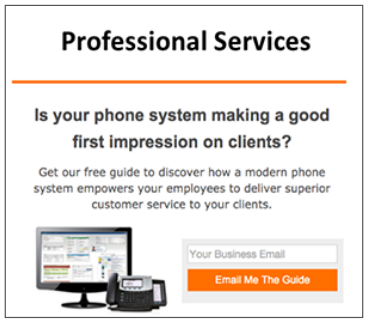
Personalize the website and CTAs by recognizing the industry of anonymous visitors

CTA



Resource offer for visitors belonging to generic SMB

CTA



Resource offer for visitors from professional services

Digium, the largest open source telecom equipment provider, targets primarily SMB accounts and segments these accounts by industry and geographic location. Digium personalizes offers and CTAs depending on the industry and geographic location that each website visitor belongs to, for both known and anonymous visitors.

Using ABM technology, Digium recognizes unknown visitors' industry profiles. The technology aggregates data from reverse IP lookups, marketing automation integrations, and user behavior records to deliver account-based insights prior to form-fill. Once anonymous visitors are profiled by account, they see content relevant to their account segments across the website, such as segment-specific eBooks, webinars, and whitepapers. At the same time, customers who visit Digium's homepage view relevant promotions to purchase more equipment. Product offerings depend on the visitor's purchase history and firmographics.

Digium saw a 32% increase in web leads, 4x chat engagement, and generated $1.3m in pipeline with ABM.

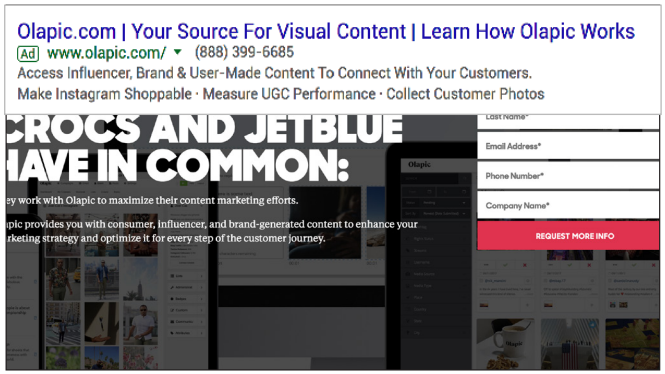
digium

$1.3m in pipeline generated

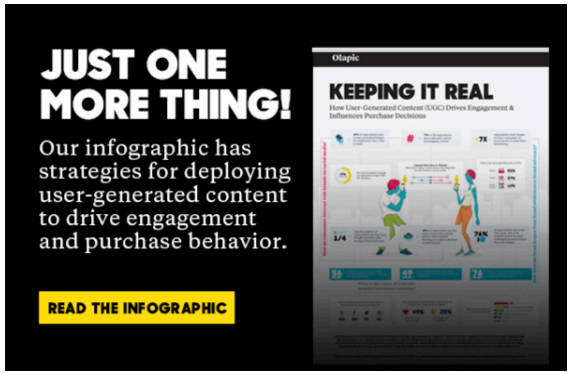
How to Improve Digital Campaign Performance

Use personalized website CTAs for web visitors that bounced from campaign landing pages

SEM Ad & Landing Page



Exit Intent CTA



Olapic is a platform for user, influencer, and brand-generated visual content. Olapic primarily serves the travel, retail, and beauty industries. Its marketing team needed a solution that allowed them to immediately show industry expertise with relevant resources for both known and unknown stakeholders. When marketing to clients using competitor solutions, Olapic needed to demonstrate upfront how highly capable their solution was for those all stakeholders.

To increase ROI on visitors that engage with social PPC campaigns and reinforce offers, Olapic deploys an exit-intent CTA to capture conversions and reinforce messaging. These CTAs are exclusively displayed to visitors that have clicked through Facebook or LinkedIn PPC campaigns. Two weeks after deploying this campaign, Olapic saw a 289% increase in conversions.

Olapic

289% increase in conversions

Increase Cross-Sell & Upsell with Large Customers

Reinforce sales messaging in ABM campaigns to influence anonymous stakeholders.

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.

With ABM, marketing focuses 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:

Cross-sell by reaching new departments with account-based advertising

Sales could find their own contacts to cross-sell in new departments. However, cross-sell campaigns could be more effective with help from marketing. Try combining account-based advertising with web personalization to key contacts and hidden stakeholders, where targeted messaging is consistent with sales outbounding.

Support sales messaging with 1:1 personalization

Sales makers and marketers will do everything they can to create 1:1 interactions with customers to upsell more product. The vendor's website, the #1 source for purchase decisions according to Forrester, could jeopardize sales if the messaging is inconsistent with sales offerings. With so many dollars on the line for upsell, keep it simple by personalizing the website to be consistent with sales makers' communications.

Cross-Sell to New Departments

Engage hidden stakeholders for sales with ABM campaigns

Ads



Account-based display ads targeted for the account and matching persona

Web Personalization



Personalized homepage messaging and imagery for visitors belonging to the same ad audience

Winshuttle, a SaaS company with about 400 employees, wanted to increase its traffic and engagement within known and unknown stakeholders within existing customer accounts.

Winshuttle targets specific stakeholders in the buying centers of their target accounts with account-based advertising. For that same audience, Winshuttle's homepage messaging matches their ad messaging and CTAs to view related resources.

Using account-based advertising, unique visitor traffic in target accounts increased by 5.6x, and total page views increased by 6.9x. Thanks to the combination of account-based ads and web personalization. Winshuttle saw a 4.8x conversion increase for target accounts.

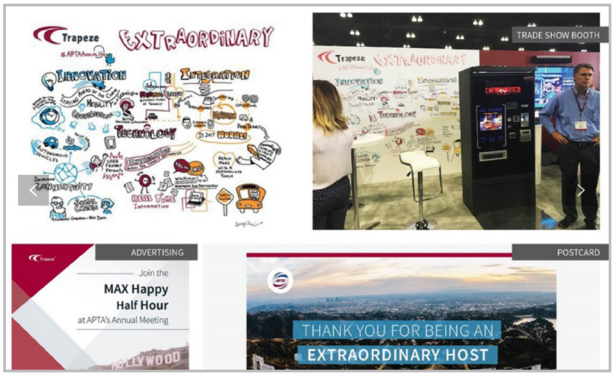
WINSHUTTLE

4.8x increase in conversions

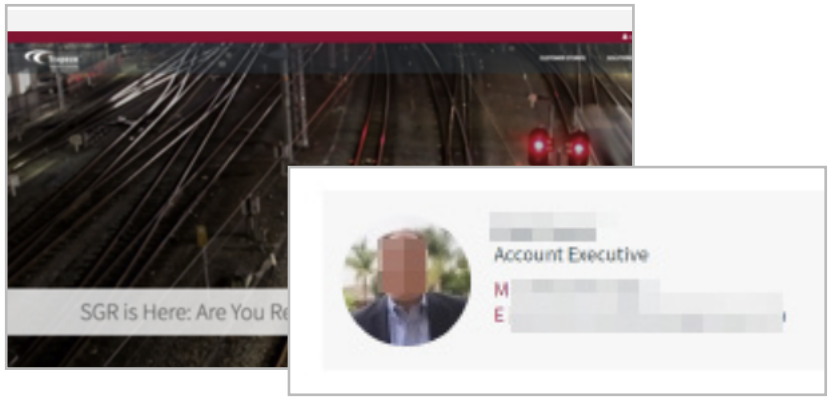
Upsell to Large Enterprises

Synchronize 1:1 ABM campaigns with sales

Ads, Direct Mail, Events



Web Personalization



Trapeze Group's ABM campaign delivers 1:1 ads and web personalization across its entire website to engage known and unknown visitors in its top 10 target accounts. Messaging, imagery, and resources are completely customized to fit each target account's geographic location, product use case, and assigned sales representative.

Trapeze Group uses field merges to create 1:1 personalizations at scale for its Tier 2 through Tier 4 accounts. For all stakeholders in each tier, Trapeze Group runs display ads, web personalizations, and overlay CTAs to create a unified multi-channel experience. Tier 1 accounts also receive a personalized direct mail component.

Trapeze Group saw a 1.5x increase in website engagement and a 138% increase in conversions from target accounts. Trapeze Group's sales team reported stronger sales conversions, thanks to the personalization tactics.

Trapeze™

138% increase in conversions

Conclusion: Ready? Set. Go!

Now that you're equipped with an actionable roadmap and various campaign ideas, what are you waiting for?

Scale ABM and optimize your account targeting.

We've outlined how to create strategic audiences to support sales across the purchase journey. Whether your organization targets thousands of new logos exploring possible solutions or a dozen large customers, vary your messaging and personal attention accordingly. It's your turn to go execute ABM campaigns that nurture stakeholders from pain point to purchase.

As one final story, we want to share about Plex, one of the world's leading ABM practitioners. Plex has succeeded in scaling 1:1 account targeting for years, reaching tens of thousands of accounts.

To help you follow suit, we've prepared some resources in the appendix. We wish you the best of luck as you proceed in forging a revenue-generating ABM program. Please don't hesitate to reach out with any questions!

The "World's Leading ABM Practitioner" is our star example.

See how Plex brings everything together in this last case study.



Case Study: Plex

"World's Leading ABM Practitioner" - TOPO

Plex is the leading manufacturing ERP cloud provider. ERP software purchases require scores of stakeholders from multiple departments, and Plex markets ERP software to small and large manufacturers who each require their own custom solutions.

Scaling ABM to Create Demand

Plex's demand generation model focuses solely on target accounts. Its target accounts must meet a "best-fit" criteria defined by marketing, sales, and product. Plex determines best-fit by firmographics, sales input, and product differentiation. In any given year, Plex will develop multiple target account segments totaling between 20,000-60,000 manufacturers.

After Plex decides on the target accounts, Plex's marketing team then works with sales operations to assign accounts to different SMB and enterprise sales reps. Account assignments are critical to ensuring each BDR/ AE team has equal opportunity weighting of revenue potential for their territory. The marketing team also develops objectives and plans integrated campaigns for demand creation.

How can ABM scale to target 40,000 accounts?

ABM Demand Generation at Scale

Plex integrates inbound and outbound marketing with sales plays. It measures marketing performance using account engagement and account funnel metrics.

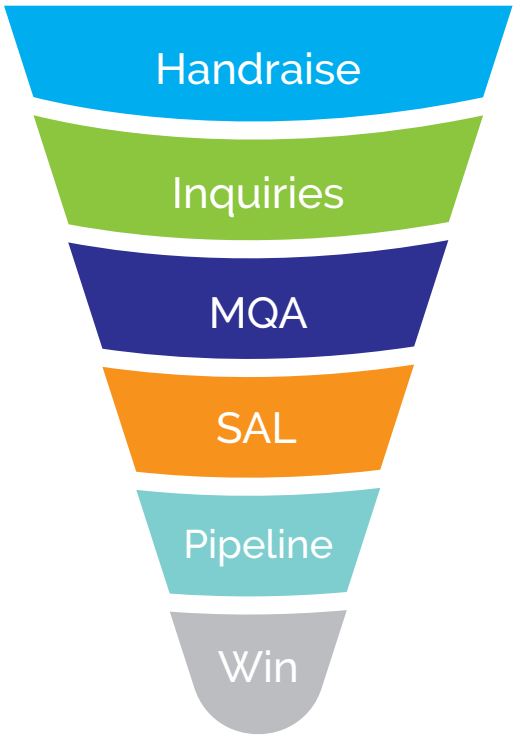
Marketing Goals and Objectives

Plex's marketing campaigns must meet account-based engagement and account-based lead objectives.

Engagement inquiries measure target account activity for both known and unknown visitors in target accounts. For measuring engagement in traditional media, Plex uses impression metrics. For MQA digital media, Plex uses ABM account metrics software that groups the digital behavior of visitors by account. Plex will track digital engagement for prospects at the top of the funnel, for SAAs with opportunities, and for current customers.

For account-based lead metrics, Plex groups all leads by target account and tracks the progress using funnel metrics like inquiries, MQLs, sales opportunities, and pipeline created.

All of Plex's marketing metrics are reported by account or account groups. Account groups are organized by lifecycle, opportunity, win stage, customer size, or account territory.



ABM Demand Funnel

Integrated Marketing Campaigns to Segments

For each manufacturing segment, Plex's digital campaigns unify messaging and calls to action across ad, email, and web channels.

Account-based Advertising

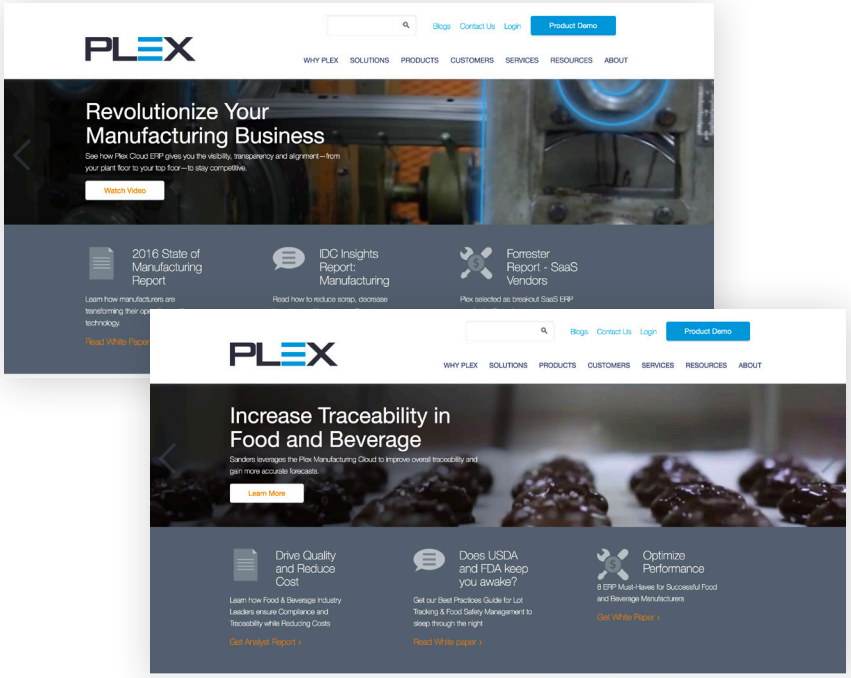
Plex uses account-based advertising to reach new and existing stakeholders in target accounts.

They segment account-based advertising audiences by funnel stage and industry segment. One specific example of an effective account-based advertising campaign is targeting known contacts that have previously expressed interest in marketing content but have not recently been active.

Web Personalization

Plex personalizes their website and landing pages for target accounts. Account personalization target both known visitors, identified in marketing automation and CRM systems, and unknown visitors, who haven't filled out an email opt-in. Homepage creative, messaging, recommended content, and calls to action all change dynamically based on which account segment the visitor belongs to.

ERP needs are very specific for each segment, and Plex wants to ensure that visitors find what they are looking for before they move to another website.



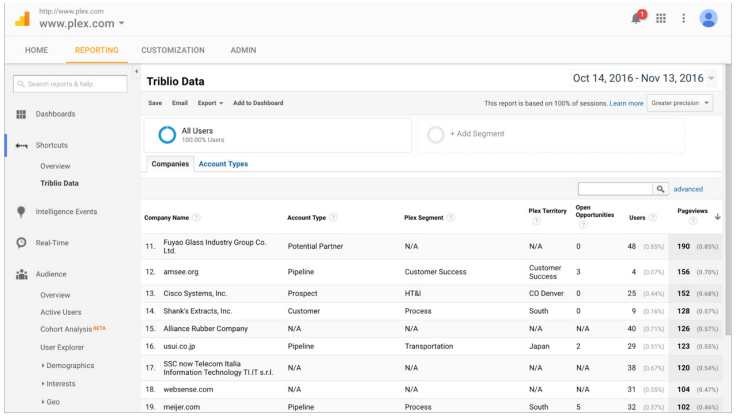
Customized Messaging by Account

Trigger Sales Plays

Marketing also provides insights into known and unknown visitors to help sales reps with outbounding and nurture campaigns. Plex's engagement reporting identifies the frequency, number of stakeholders, and specific content interests for target accounts. Knowing an account's digital body language, including known contacts and unknown visitors, triggers sales prioritization and influences what sales plays to use.

One aspect of a sales play that's created by marketing is the curated content hub for target account segments. By sending content hubs related to an account's profile and engagement interest, reps establish trust and increase engagement

Thanks to account-based marketing, sales reps establish this trust sooner. Instead of waiting for stakeholders to complete a form, reps recognize anonymous visitors from target accounts that are engaged in specific content on web pages and landing pages. They will then find relevant contacts to reach out to in those target accounts.



Anonymous Visitor Engagement

76%

Pipeline Sourced

from ABM campaigns



"ABM transformed our demand"

Jennifer Dimas, VP Marketing, Plex Systems

APPENDIX

Appendix A. Building An Ideal Customer Profile

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

Begin with analyzing 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?

Ideal Customer Profile						
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 customized 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 from 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.

	Contacts per Account					
	Current			**Goal**		
Data Source	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.

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

Circle your objective from the following:

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

Measure Existing Demand Gen by Accounts	Opportunity Creation	Opportunity Influence
Email Metrics • CTR by Accounts • Opens by Accounts	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
Web Metrics • Account Traffic • Account Session Duration • Content Interest by Account		
Ad Metrics • CTR by Accounts • View-throughs by Accounts • Account Impressions		

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									
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 Personalization			
Microsites			
Sales Alerts			
Email Nurture			
Events			
Webinars			
Direct Mail			
SEM			

Appendix F. Group account segments on this grid

Now that you have segmented and prioritized 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 organize your ABM campaigns.

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

