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Mastering ABM: Overcoming Key Challenges in Professional Services Marketing

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Strategic ABM: Pride, prejudice and potential pitfalls

by Oliver Hammans, *Global Marketing Account Activation Leader*, **EY**

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Mastering ABM: Overcoming Key Challenges in Professional Services Marketing



Lina Vaz,
Senior Editor, **Propolis**

Account-Based Marketing (ABM) has become a cornerstone strategy for B2B marketers seeking to engage high-value clients with precision and impact. Yet, delivering ABM in the professional services sector presents unique challenges that set it apart from other industries. Unlike product-focused businesses, professional services often rely on intangible offerings, trust-based relationships and often lengthy decision-making cycles.

For B2B marketers, this means crafting hyper-personalized campaigns that resonate with multiple stakeholders while aligning closely with the expertise and reputation of their firm. Add to this the complexities of navigating compliance and the need to quantify the ROI of such targeted efforts, and it's clear why professional services firms often struggle to scale their ABM initiatives effectively.

To gain insights on navigating these challenges and driving success with ABM, I spoke with Neil Berry, Global Account-Based Marketing Director, Capgemini, and Oliver Hammans, Global Marketing Account Activation Leader at EY.



Neil Berry,
Global Account Based Marketing Director, **Capgemini**



Oliver Hammans,
Global Marketing Account Activation Leader, **EY**

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The Art of Account Selection

Account selection in professional services is an intricate process that requires a far more nuanced approach than in most other industries. While high-growth accounts in sectors like technology often align directly with overarching business priorities, professional services need a more comprehensive and nuanced evaluation.

Oli explains that in professional services, identifying which accounts to prioritize for ABM involves navigating several layers of complexity. A common mistake, according to Oli, is assuming that an account's current importance to the business automatically qualifies it for ABM. In reality, accounts need to demonstrate engagement potential, scalability and alignment with long-term growth strategies. Neil further elaborates on this challenge by highlighting the human dynamics that support account selection:

"Many leaders on the account will fully understand how to leverage marketing, while others may be less familiar with it. Identifying the right people to support you is crucial, as professional services are ultimately driven by people. Without strong buy-in from top-level leadership on the account, establishing trust and successfully delivering marketing execution becomes very challenging."

By addressing potential resistance and tailoring strategies to the unique characteristics of each account, professional services marketers can position themselves in a way that delivers more impactful and sustainable results. In this way, the art of account selection becomes as much about internal collaboration and strategic alignment as it is about identifying external opportunities.

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Scaling ABM: Both the Greatest Challenge and Opportunity

For professional services marketers, scaling ABM represents both the greatest challenge and opportunity. While scaling ABM is a widely recognized hurdle across industries, it is particularly complex in professional services due to the industry's foundational reliance on relationships. Oli captures the essence of this challenge:

"The question of scalability is clearly one that comes up many times for ABM all around the world. Scalability seems to be one of those ABM buzzwords that's never going away. It's true in professional services that relationships drive sales. The biggest asset for us as a firm is our people. The relationships that people might have with our target buyers is the ultimate personalization. Things like authenticity and relatability are what will drive us to become trusted advisers to our key buyers."

At its core, ABM in professional services isn't just about implementing marketing strategies, it's about scaling the human connections that support the business. The relationships between key account teams and their clients are highly personal. Scaling this kind of trust and authenticity is far more difficult than expanding the reach of a product-based campaign in other industries.

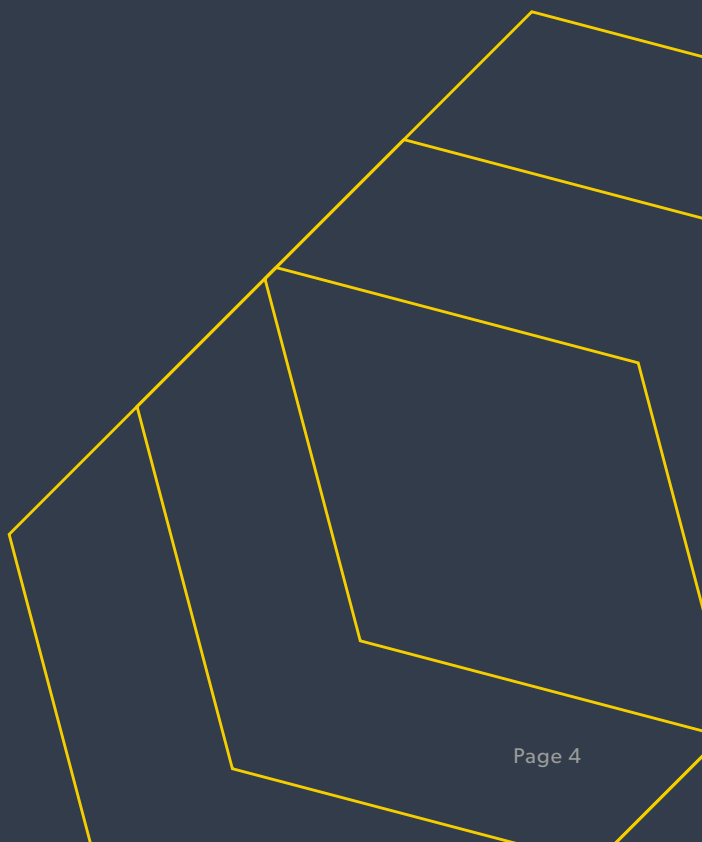
The challenge is the result of evolving client expectations, who increasingly demand that their unique needs and priorities are understood at a granular level. Broad marketing approaches simply won't work. Instead, marketers must develop strategies that can deepen understanding and align with the specific goals of each client, even as they aim to scale their efforts across multiple accounts.

Neil points to the critical role that ABM plays in navigating this balancing act:

"ABM continues to play a key role in enhancing this understanding and supporting these efforts. Fortunately, account teams leading these engagements are often deeply embedded with clients and maintain strong relationships. These relationships provide valuable insights, which, in turn, foster a two-way dynamic that strengthens collaboration and trust."

Scaling ABM in professional services requires marketers to walk a fine line between personalization and efficiency. It's a daunting task, but for those who master it, the rewards are significant. Not only does it enable firms to strengthen their client relationships, but it also positions them as trusted advisers capable of delivering exceptional value.

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Customer-Centricity:
Meeting Rising Expectations

In today's market, customer expectations are at an all-time high as a result of the evolving digital landscape, increased competition, and a stronger focus on value-driven relationships. Oli stresses that ABM offers professional services firms the tools to not just meet but exceed these demands by championing customer-centricity:

"Understanding what the customer wants, not just from the business, but from an experience perspective, is something that ABM is absolutely at the forefront of. An effective ABM has to talk to buyers about the things that they care about in the ways that they want to engage with us. I think that's true across ABM and it's certainly true of professional services as well."

This means going beyond traditional touchpoints to deliver personalized, relevant experiences that position the firm as a trusted adviser.

By focusing on buyer preferences, ABM ensures that interactions feel less transactional and more like a partnership. This is an essential quality in professional services, where trust is paramount. Oli stresses the importance of understanding the unique dynamics within each client organization:

"Just as the business transformation challenges faced by two banks are unlikely to be the same, I think it's important not to make an assumption that two account teams focused on businesses within the same industry might automatically share the same business priorities."



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Legacy Technology and Audience View

For professional services firms, legacy technology remains a significant barrier to delivering effective ABM strategies. While many industries grapple with outdated systems, the challenge in professional services goes beyond simply modernizing a tech stack. The real goal, as Oli explains, is to achieve a 'single view of the audience':

"Professional services around the world certainly experience challenges when it comes to legacy technology. The challenges that are faced range from not just unifying a tech stack. In fact, that's a means to an end. I think the most important thing is to try and achieve a single view of your audience. And with legacy technology that often doesn't work well together, getting a single view of your audience is a really big challenge."



This fragmentation in technology poses a unique obstacle for professional services firms, where a deep understanding of clients is crucial to building relationships and trust. Disconnected systems make it difficult to centralize data, track client interactions and personalize marketing efforts effectively. Without a unified view, marketers struggle to align their campaigns with the specific needs and preferences of their audience.

Achieving this integration requires more than just new tools. It demands integrating marketing and automation platforms to centralize operations, fostering digital marketing maturity. This means investing in training, refining workflows and ensuring compliance across systems.

A unified view of the audience allows marketers to deliver more cohesive and personalized ABM strategies. For professional services, where trust and relationship-building are paramount, overcoming the challenges of legacy technology is not just a technical upgrade but a fundamental step toward staying competitive.

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Breaking Down Silos:
ABM as a Silo Buster

Silos within organizations are an enduring challenge, particularly in professional services where complex structures and fragmented workflows often slow progress. While it's unrealistic to eliminate silos entirely, the focus must be on minimizing their impact and fostering collaboration. Neil emphasizes the importance of this effort, sharing how Capgemini addresses the issue:

"In professional services, a group function provides the opportunity to take an elevated perspective and ensure that the right connections are being made. It helps us ask critical questions, such as: Are we presenting a 'one-company' narrative to our clients? If professional services organizations fail to do this, clients may encounter three, four, or even five different versions of an organization."

This "one-company" narrative is crucial in professional services, where clients expect seamless integration and clear communication. One of ABM's most significant advantages lies in its ability to unify cross-functional teams. By design, ABM encourages collaboration across sales, marketing, and account teams, breaking down barriers that often hinder progress. Oli highlights the importance of fostering teamwork:

"ABM is absolutely the ultimate silo buster. It's a mandatory requirement for an effective ABM program to involve collaboration across multiple teams. We see that here at EY, and we've got an amazing organization that really focuses on how we team together."

For global firms, this collaboration often spans multiple geographies and time zones, adding another layer of complexity. Coordinating efforts across diverse regions requires a shared vision and consistent communication to ensure alignment. However, when teams rally around common objectives and work as a cohesive unit, ABM initiatives gain the momentum needed to drive meaningful outcomes.

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Proving the ROI of ABM

For professional services firms, demonstrating the ROI of ABM initiatives is a top priority, but the long and intricate sales cycles characteristic of the sector, coupled with large and often decentralized buying committees, make it challenging to draw a direct line between marketing activities and revenue outcomes. Yet, as Neil from Capgemini explains, they've found ways to measure success by focusing on the three Rs: Reputation, Relationships, and Revenue.

"Deals are a clear way to demonstrate how marketing has contributed to changing revenues and driving financial impact. We do have to account for a heavily elongated sales cycle in professional services organizations as well as large buying committees. Marketing can play a role in influencing these buyers, driving direct revenue influence."

In professional services, deals often unfold over months or even years, and marketing's role is as much about influencing decision-makers and building trust as it is about driving conversions. This dynamic makes traditional ROI metrics harder to apply, but by tying marketing efforts to specific outcomes marketers are able to showcase the value of ABM programs.

Oli also acknowledges the importance of aligning ABM activities with revenue objectives. For EY, this means starting with financial and account planning to ensure resources are directed toward high-growth opportunities, creating a clear connection between ABM efforts and profitability. "Tracking is critical," Oli stresses. EY integrates its marketing technology with CRM systems to trace the journey from initial engagement to revenue realization.

This integration allows the firm to capture the full impact of its ABM initiatives, providing data that illustrates how marketing contributes to the bottom line. While implementing such systems requires careful planning, investment and coordination across teams, the payoff is significant. By taking a structured approach to tracking and measurement, professional services firms can navigate the challenges of long sales cycles and demonstrate the tangible impact of ABM.

Driving ABM Success: Key Takeaways for B2B Marketers

In the professional services sector, mastering ABM requires a delicate balance of strategy, personalization and collaboration. From selecting the right accounts and scaling relationship-driven approaches to integrating legacy systems and demonstrating ROI, the challenges are numerous but not insurmountable.

Success lies in fostering cross-functional teamwork, leveraging insights to deliver hyper-personalized experiences and maintaining a relentless focus on the client's needs and expectations.

By adopting a holistic and client-centric approach, professional services firms can transform ABM from a marketing strategy into a competitive advantage that drives meaningful business outcomes and lasting relationships.



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