triblio

The Essential Guide to Award-Winning ABM Campaigns

CONTENTS

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 B2B marketers, you might ask:

- How do I reach anonymous stakeholders involved in the purchase decision?
- How do I deliver relevant messaging at each stage of the purchase journey?
- How do I guide the entire purchase group towards reaching a consensus?

ABM coordinates sales and marketing campaigns across all stages. Whether you're targeting 1 or 10,000 accounts, ABM can help your organization scale 1:1 account targeting for pipeline impact.

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 personalization, a convincing angle, and the right mix of channels for each target audience.

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*
✓ *Design Multi-Channel Orchestration*

Go!

✓ *Execute ABM Campaigns*
✓ *Measure and Optimize Results*
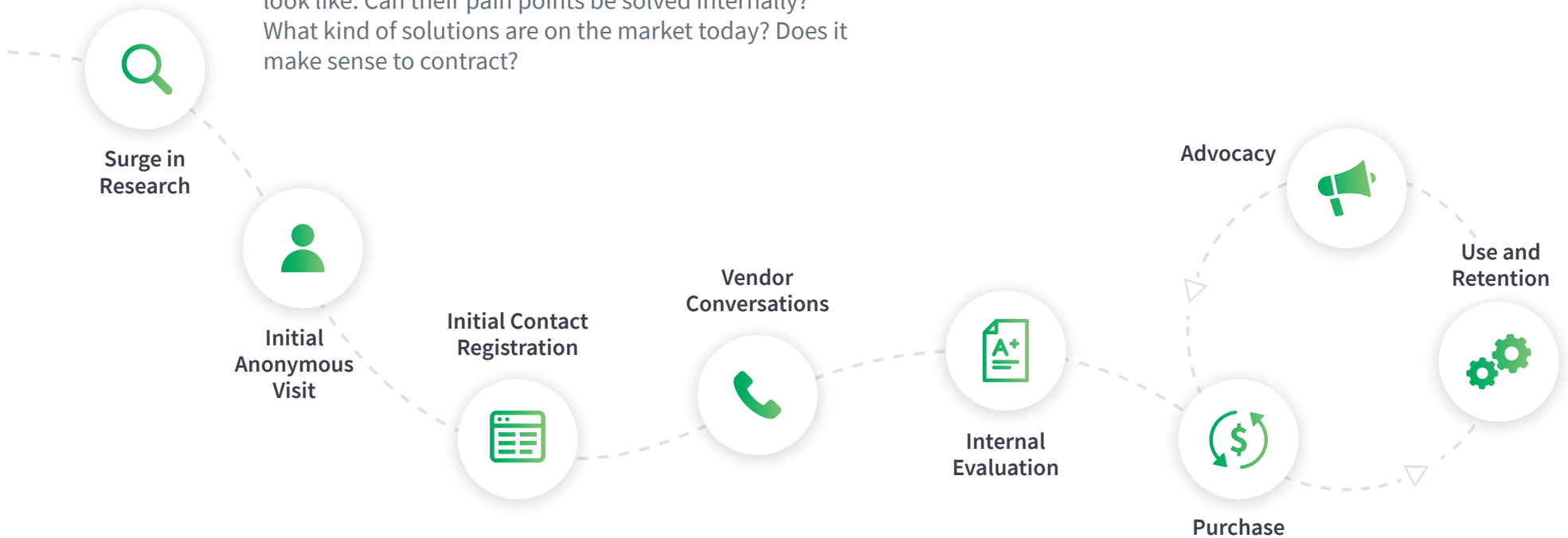
The B2B Purchase Journey

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 starts the arduous process of internal evaluations, 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.

However, no one purchase journey is exactly the same. At any moment, new information from any one of the channels could push buyers onto a different path.

Surge in Research

Initial Anonymous Visit

Initial Contact Registration

Vendor Conversations

Internal Evaluation

Purchase

Advocacy

Use and Retention

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

The Broken State of Vendor Interactions

Marketing stops where sales starts.

Many B2B marketers still follow a traditional lead generation approach to marketing. They have a single-minded focus on sparking form-fills, and after capturing inquiries, 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.

Traditional lead generation misses huge opportunities because marketers:

1. Only use email to nurture and communicate with leads

2. Nurture individual leads rather than all stakeholders in a purchase group

3. Treat all leads equally, only activating sales on leads that reach a certain lead score, whether or not they belong to a target account

When more than half of the purchase journey is 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.

57% of the purchase journey is anonymous

Initial Contact Registration

Vendor Conversations
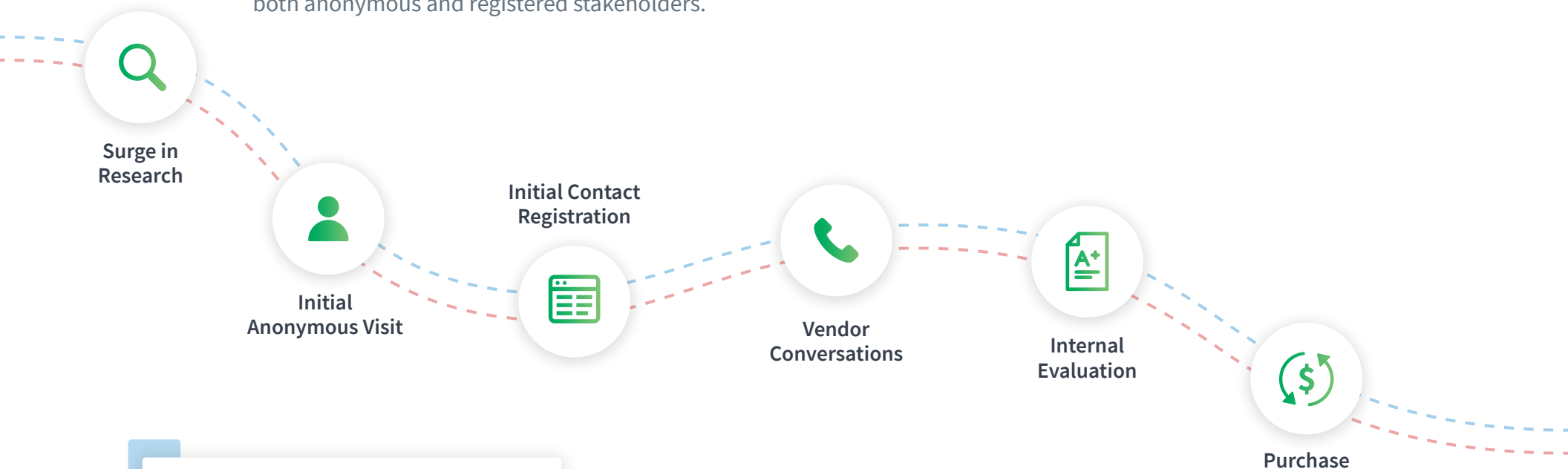
Purchase

Marketing ○ – – – – – –

Sales ○ – – – – – –

ABM Unifies Campaigns for Pipeline Impact

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 customize each subsequent digital interaction and trigger sales early. Consistent air coverage makes it more likely for buyers to engage in 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.

Surge in Research

Initial Anonymous Visit

Initial Contact Registration

Vendor Conversations

Internal Evaluation

Purchase

Marketing & Sales Orchestration at All Stages of the Purchase Journey

The Essential Guide to Account-Based Marketing

ABM unifies inbound and outbound marketing with sales plays to grow pipeline for target accounts. B2B marketers can execute ABM across all stages of the purchase journey for all types of accounts.

The challenge lies in deciding where to focus your resources, when to reach out, and how to target different account segments for peak impact.

Triblio has assisted thousands of ABM campaigns. Drawing from real ABM case studies, we've put together a tried and true project plan for ABM success. Presenting, the ABM Guide for Pipeline Impact – a deep dive into the essential strategies and tactics behind getting ready, setting up, and executing ABM.
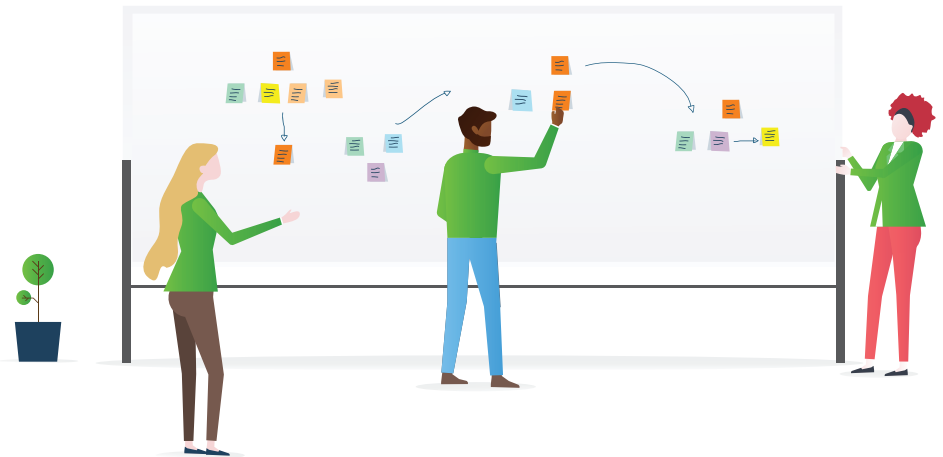
Ready?
✓ *Find Organizational Support*
✓ *Define Your Ideal Customer Profile*
✓ *Develop a Target Account List*
✓ *Assess Current Campaigns*

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

Go!
✓ *Execute ABM Campaigns*
✓ *Measure and Optimize Results*

Ready?

The good news is, 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 organizational readiness.

✓ **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**

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 Organizational Support

The ideal ABM program 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 organization, 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, you executives may already be setting account-based objectives. The following top-down initiatives show that your organization should already be organized 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 organizational 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
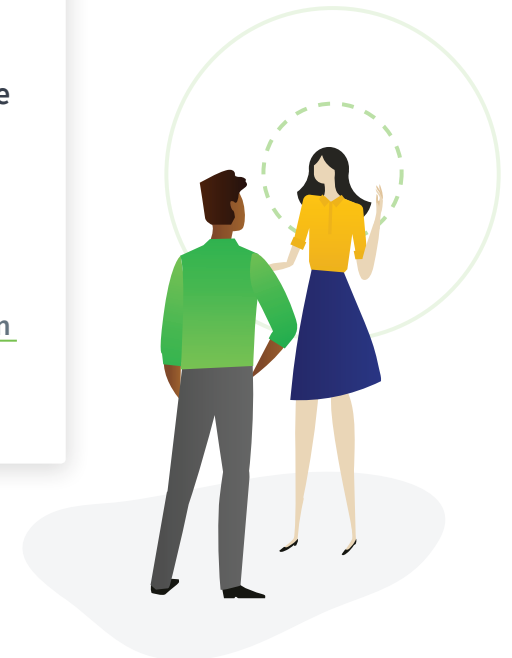- Budget

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 programs can get results with almost any list of target accounts.

However, the best source for target accounts depends on each organization's business objectives and marketing goals. Think also about the parts of the organization 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 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 — 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?
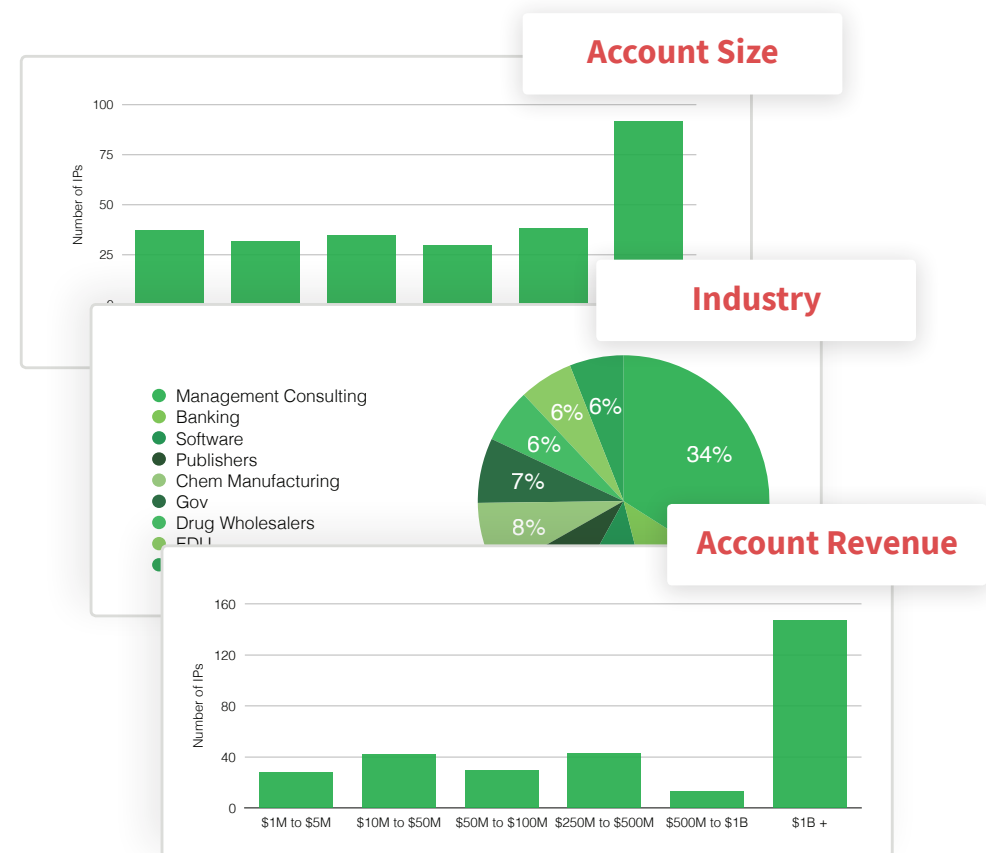
Given a historic benchmark for target account activity, marketers can make informed decisions around which campaigns to keep, optimize for ABM, or ditch completely. If you're not sure where to start, we've created a **benchmarking worksheet in Appendix E.**

For marketers who aren't sure how to set up account metrics, ABM technology vendors like Triblio offer tools that analyze 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

Account Size

Industry

- Management Consulting
- Banking
- Software
- Publishers
- Chem Manufacturing
- Gov
- Drug Wholesalers
- EDU

6% 6%
6%
7%
8%
34%

Account Revenue

$1M to $5M | $10M to $50M | $50M to $100M | $250M to $500M | $500M to $1B | $1B +

Set Up and Launch ABM Campaigns in 30 Days

Organizational 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.
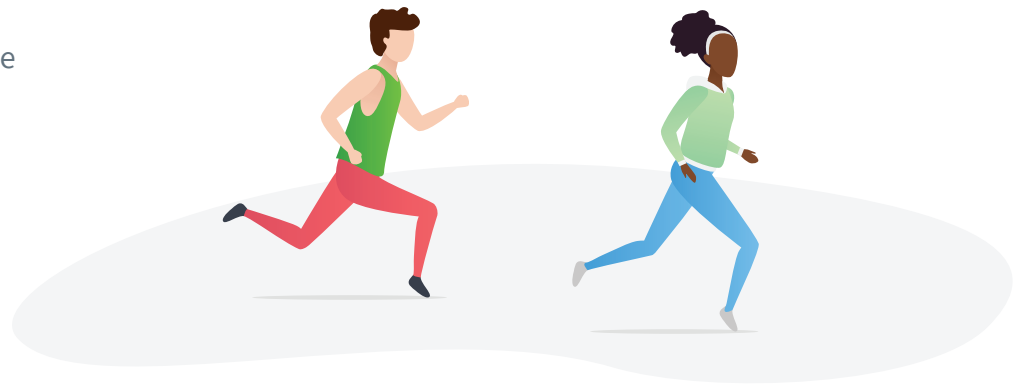
0-30 DAYS

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
- ✓ Design Multi-Channel Orchestration

Go!
- ✓ Execute ABM Campaigns
- ✓ Measure and Optimize Results

Set

When an organization is ready for ABM, the next step is to prepare for launch. Follow the following four 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 for 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 optimize the level of personalization, vary the mix of channels, and deliver uniquely compelling calls-to-action for each target account audience.
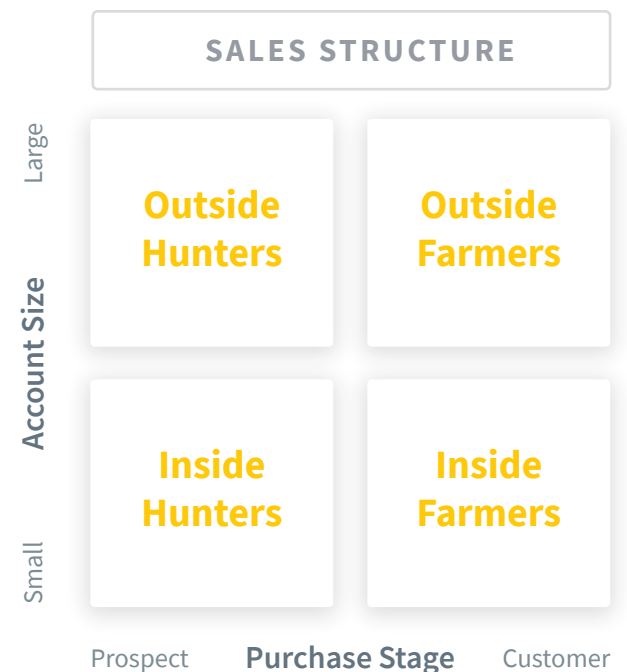
What are the rules for ABM segmentation?

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 organized to address the unique needs of each type of account. Teams with different focuses go by different names. The chart on the right helps visualize this age-old sales structure.

The best practice in ABM is to mirror sales segmentation.

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

SALES STRUCTURE

	Prospect	Customer
Large	Outside Hunters	Outside Farmers
Small	Inside Hunters	Inside Farmers

Account Size

Purchase Stage

In a classic sales organization, 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.
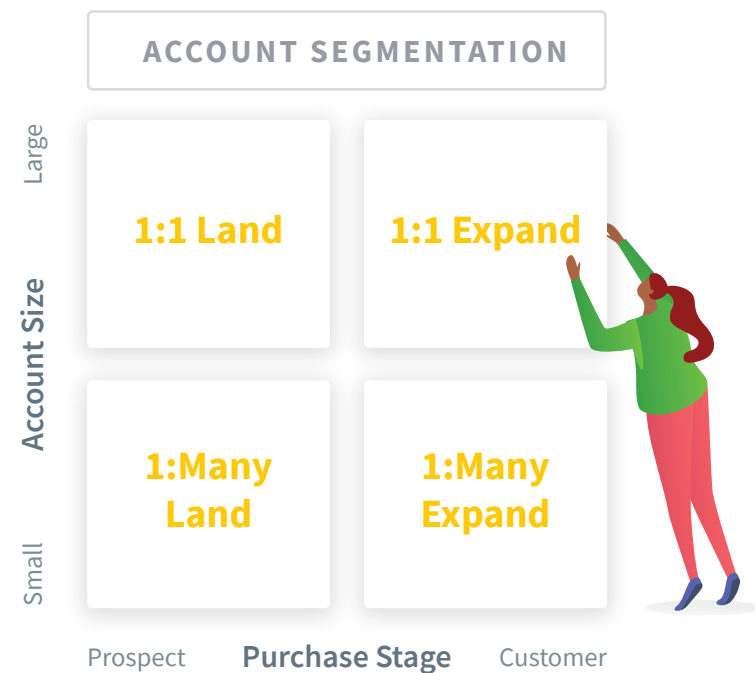
Build Audience Segments *continued*

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 personalization.

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

ACCOUNT SEGMENTATION

	Prospect	Customer
Large	1:1 Land	1:1 Expand
Small	1:Many Land	1:Many Expand

Account Size

Purchase Stage

Build Audience Segments

continued

PERSONALIZATION BY ACCOUNT SIZE

1:1 Personalization for Complex Needs

1:1 Personalization at Scale for Semi-Custom Needs

1:MANY Personalization for Segment Needs

Account Size

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.
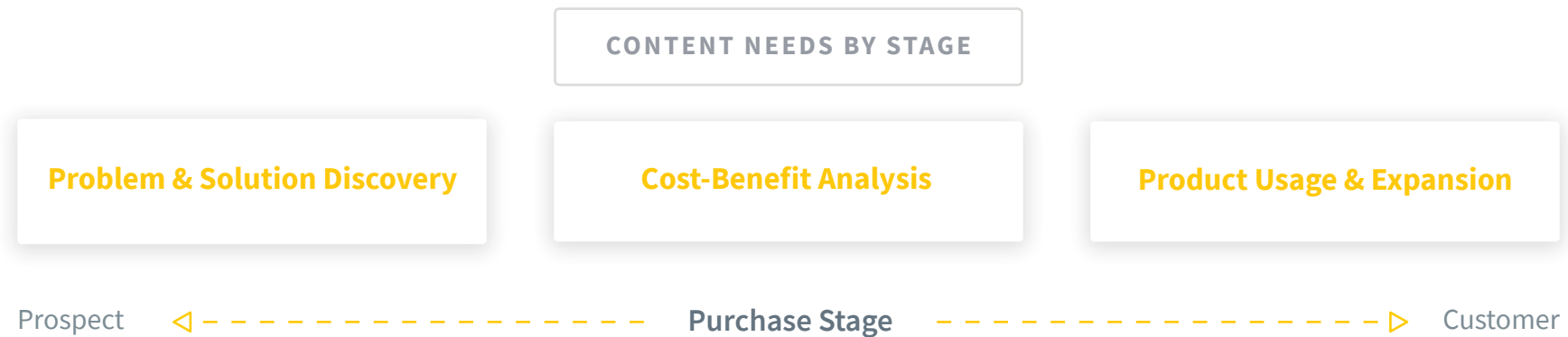
Large accounts require the most one-on-one attention. Each department follows its own purchase journey, and there are lots of buying centers with lots of stakeholders and complex needs. Large groups of stakeholders raise unique problems that require customized solutions. The only way for marketing to 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 personalized messaging, perhaps calling out a few custom needs for a certain target persona.

Build Audience Segments

continued

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 optimize 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 stakeholder in your target segments?

Marketers have a number of options for sourcing stakeholder contacts. 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 programs, 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 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 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 behavior 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 optimize 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

Visualize 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 programs can combine information about target account activity to pipeline influence and revenue impact. In account-based organizations, 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 summarize the level of account activity in real time, which helps prioritize marketing spend and sales interactions.

Design Multi-Channel Orchestration

Difference audiences have different patterns of behavior. In response, marketers need to design ABM programs that vary by audience. Marketers can achieve winning results for each segment with the right mix of personalization, 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 programs. While ABM campaigns don't require full-funnel planning, marketers should incorporate key funnel concepts.

- Activate Interest
- Qualify Accounts
- Opportunity
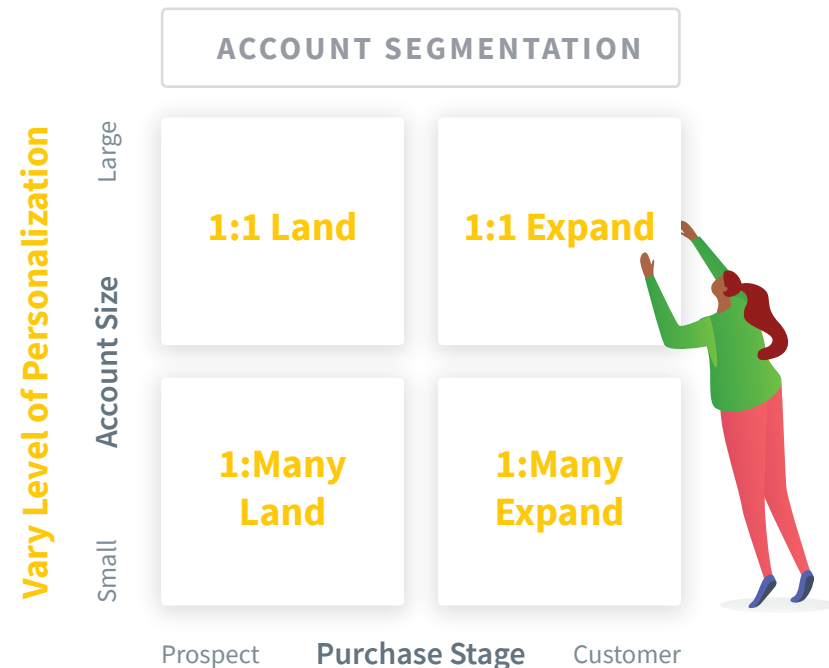- Close

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 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.

ACCOUNT SEGMENTATION

Vary Level of Personalization

Account Size

Large

Small

1:1 Land	**1:1 Expand**
1:Many Land	**1:Many Expand**

Prospect — **Purchase Stage** — Customer

Vary Messaging, Creative, CTAs

Design Multi-Channel Orchestration *continued*

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.

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.

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. Deemphasize 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.
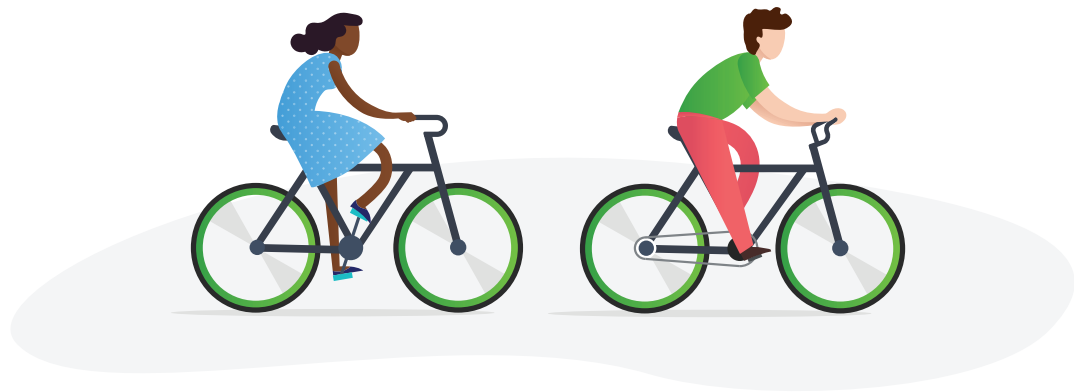
0-30 DAYS

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*
- ✓ *Design Multi-Channel Orchestration*

Go!
- ✓ *Execute ABM Campaigns*
- ✓ *Measure and Optimize Results*

Go!

There's no such thing as the "best" ABM campaign. The right campaign to run varies from audience to audience. Triblio has helped execute thousands of ABM campaigns, and we've drawn from our most successful customers to highlight winning plays for different types of audiences in the following section.
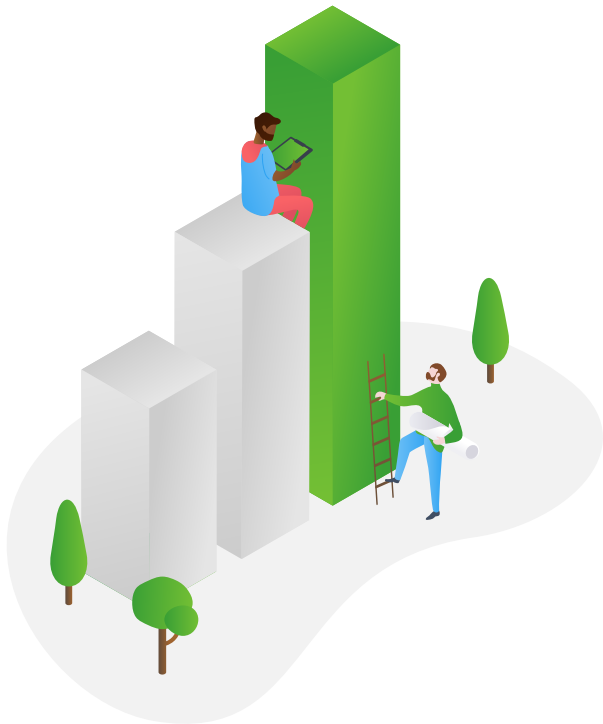
✓ **1:1 Land**

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 personalization campaigns.

✓ **1:1 Expand**

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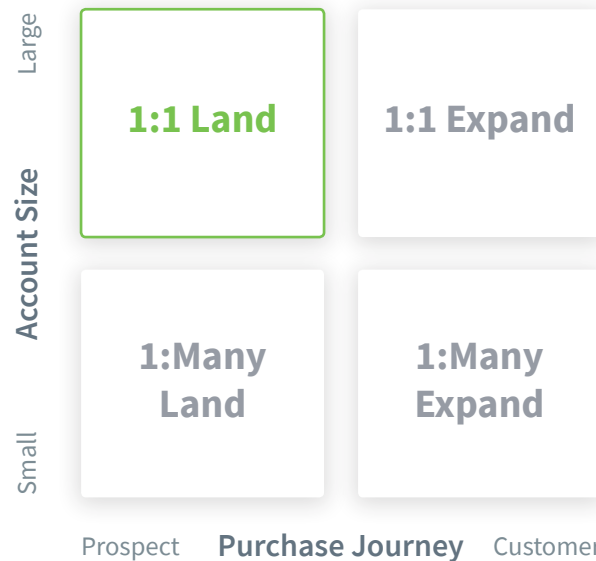
✓ **1:Many Expand**

Cross-sell and upsell by engaging both contacts and hidden stakeholders.

Win Over Large Accounts with 1:1 Personalization

The complex organizational structures found in enterprise accounts demand custom solutions, so it's important to create buying experiences that are equally personalized to their particular needs. Aim to build trust with key stakeholders by delivering unified messaging across marketing and sales, and initiate outreach at timely and tactful intervals.

	Large	
	1:1 Land	1:1 Expand
	1:Many Land	1:Many Expand
	Small	

Account Size

Prospect **Purchase Journey** Customer

KEY TACTICS

1:1 Account Ads
Create memorable impressions with tailor-made creatives.

1:1 Content Pages
Engage prospects with hand-picked content.

Intent-based Sales Triggers
Track purchase signals to initiate outreach at the point of interest.

Visibility into Account Activity Accelerates Pipeline

DODGE DATA & ANALYTICS

Key Tactic

Pair focused ad messaging with intent-based sales outreach

Challenge

Dodge Data & Analytics provides construction intelligence to a wide range of customers from large building product manufacturers to independent contractors. Marketing drives a lot of demand among smaller accounts but needed new tactics to help grow its enterprise business.

> " Without Triblio, I'd be blind to a lot of things. Triblio brings a lot of this account behavior and activity right in front of me so I can act upon it. That's powerful.

Performance Marketing Director

Solution

Dodge Data started by re-engaging cold accounts. The marketing team ran 1:1 ads that incorporated unique bits of construction data to catch the attention of key stakeholders. Then, it watched for signs of renewed interest through first-party intent. Using Triblio, Dodge Data could see whether a known visitor clicked through to the landing page or an anonymous visitor came to the site. When account activity surged, sales reps knew it was a good time to reach back out.

Watch Dodge Data's Customer Story →

Deep Personalization Boosts Awareness and Drives Consensus

signifyhealth™

Key Tactic

Unify and personalize air cover to reinforce sales outreach

Challenge

Signify Health, a $200M health assessment provider, deals with large groups of buyers on a regular basis. Its marketing team needed a way to reach all stakeholders in the purchase decision, whether or not they were actively engaged in the sales process, in order to nurture consensus.

Solution

To boost brand awareness and promote industry expertise within strategic opportunities, Signify Health ran 1:1 account-based advertising and web personalization. These new ABM campaigns complimented existing email, direct mail, and event-based campaigns. They also acted as a digital continuation of sales conversations at each stage of the purchase journey.

signifyhealth™
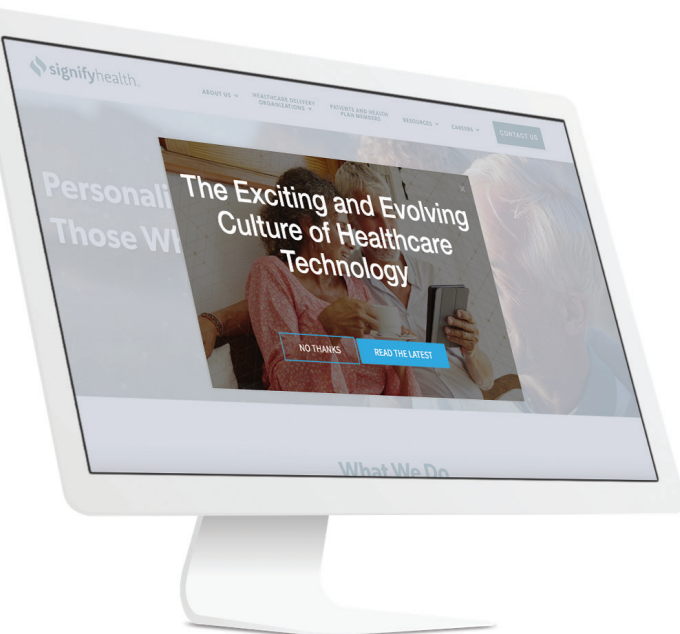
Your Strategic Procedure Referral Network Partner for Improving Patient Outcomes in All 50 States

LEARN MORE

Talk to an expert about 1:1 ABM campaigns →

4

Expand within Large Customers

Oftentimes, vendors start with existing relationships to launch expansion programs. When there's an initial level of trust established in your brand, buyers are more receptive, so sales can be more bold about reaching out. Marketing can then support sales outreach with air cover across multiple channels. ABM upsell and cross-sell campaigns use both marketing and sales touches to remind customers of past successes and reinforce positive experiences within the partnership.
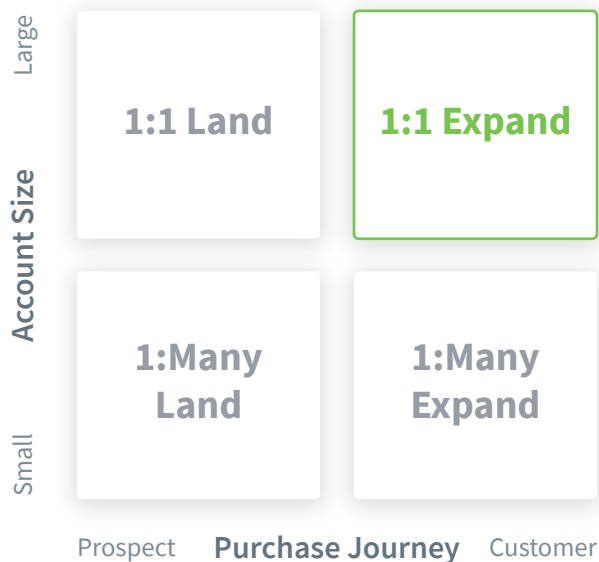
KEY TACTICS

Unified Air Cover
Support sales by reinforcing account-specific messaging across multiple channels.

Hidden Purchase Insights
Arm your sales team with knowledge of hidden interests by monitoring first and third party intent signals.

| Large | 1:1 Land | **1:1 Expand** |
| Small | 1:Many Land | 1:Many Expand |

Account Size

Prospect   **Purchase Journey**   Customer

Extensive Air Cover Increases Expansion Opportunities

Trapeze™

Key Tactic

1:1 air cover across the ads and the website

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. The company's top 10 target accounts included a mix of prospects and customers.

Solution

For its expansion campaign, Trapeze ran 1:1 account-targeted, multi-channel campaigns to engage key stakeholders. At every interaction, messaging, imagery, and resources were completely customized 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. As a result, both marketing and sales saw stronger conversions and response rates.

Quick, **what are the top 3 things your riders care about?**

Check If you Where Right
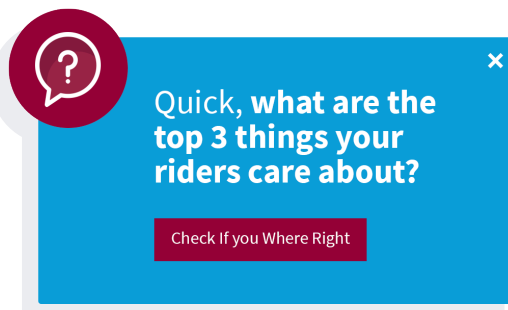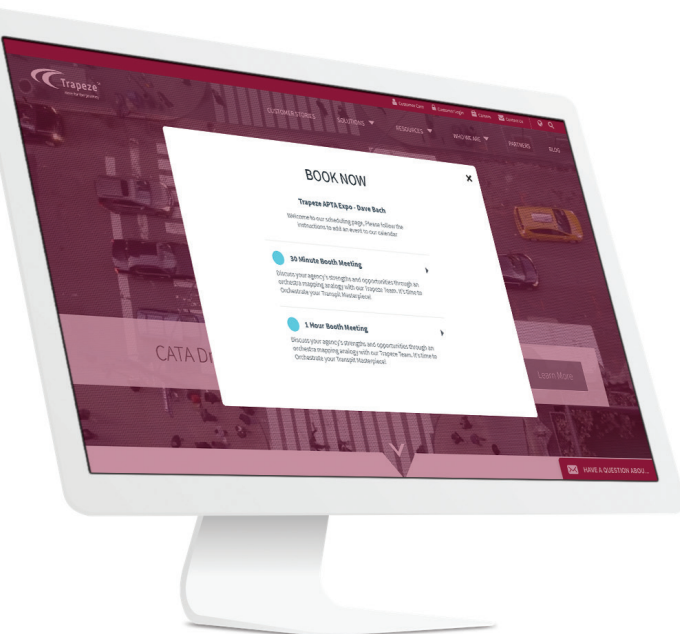
2018 Best ABM Campaign
Demand Gen Report →

Grow Pipeline within Small and Midsize Accounts

Marketers can scale their impact on pipeline by grouping small and midsize companies into like-minded segments. ABM tools help manage these dynamic audiences and orchestrate campaigns for thousands of accounts at a time. With the right tools, your campaigns will reach both known and unknown stakeholders within your target accounts. This way, you can accurately track the digital footprints of prospective accounts and activate sales at the point of interest.

1:1 Land	**1:1 Expand**
1:Many Land	**1:Many Expand**

Account Size: Large / Small

Prospect — **Purchase Journey** — Customer

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 maximize 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.

Orchestration Transforms Marketing's Impact on Pipeline

FINANCIALFORCE

Key Tactic

Scale ABM across channels from direct mail to ads, the website, and sales

Challenge

FinancialForce is a cloud ERP solution backed by Salesforce. Its number one goal in marketing is to drive pipeline for sales. However, marketing wasn't running campaigns to the same high value accounts sales was targeting. They'd send gifts to trigger inbound opportunities with large prospects, but without sales on board, this was little more than a lead gen tactic.

> " **Our number one KPI is driving pipeline for the sales team.**
>
> Director of Demand Gen

Solution

When FinancialForce switched gears to ABM, marketing worked closely with sales to coordinate a series of marketing and sales touches that delivered unified messaging across multiple channels. These interactions included account-based advertising to both known and unknown stakeholders, account-specific microsites, and a range of direct mail pieces.

The campaign was so successful that within six months, the marketing team had shifted more than 40% of its demand gen from leads-based to account-based campaigns.
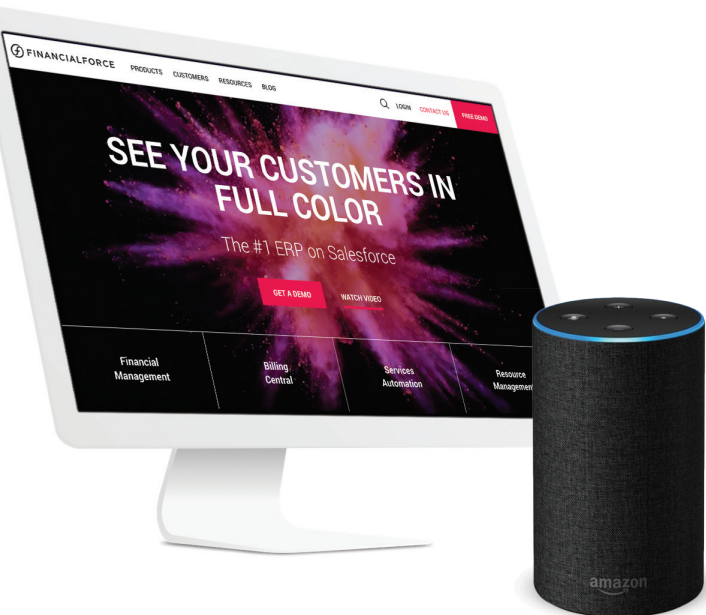
Learn More About FinancialForce's ABM Program →

Intent-based Campaigns Attract New Prospects

VERISTOR®

Key Tactic

Gather intent data to build like-minded audiences and trigger topical campaigns

Challenge

Veristor Systems designs and deploys IT solutions. Its business depends on close-knit partnerships. However, developing new relationships is difficult because each sale is customized, and potential buyers have vastly different needs.

Solution

Veristor built an ABM program centered on intent data. The marketing team worked with Triblio and Bombora to monitor first and third-party purchase signals. When Veristor saw heightened levels of intent, it used Triblio to group accounts with similar interests and trigger topical marketing and sales plays.

salesforce

∨ Triblio Data

Triblio Ad Impressions (Last 90 Days)	Triblio Account Status
250	5. Qualified Opportunity
Triblio Account Score (Last 7 Days)	Triblio Account Type
50	Prospect
Triblio Account Score (Last 30 Days)	Triblio MQA
112	☑
Triblio Account Score (Last 90 Days)	Triblio First Activity Date
285	10/3/2017
Triblio Pageviews (Last 90 Days)	Triblio Last Activity Date
8	11/13/2018
Triblio Visitors (Last 90 Days)	Triblio MQA Date
20	5/30/2018
Triblio Unknown Visitors (Last 90 Days)	Triblio Account Tier
17	Target Account
Triblio Known Visitors (Last 90 Days)	Opportunity Probability
3	90%

"
Better open rates, click rates, response rates if you start with intent data.

VP of Marketing

Watch Veristor Talk About its Success with ABM & Intent →

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?

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.

	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 Personalization		
Microsites		
Sales Alerts		
Email Nurture		
Events		
Webinars		
Direct Mail		
SEM		

Appendix F. Group Account Segments

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.

Account Size — Large / Small

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