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# What ABM really means and looks like for marketers

 B2B Marketing  
Insight · Development · Training · Events



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# Introduction

## What ABM really means and looks like for marketers

Just 11% of B2B marketing teams have a fully developed ABM plan in place.

That's a cause for concern. Our research shows that 63% of B2B marketers see ABM as an important part of their strategy, with 80% planning to increase their focus on it in the year ahead.

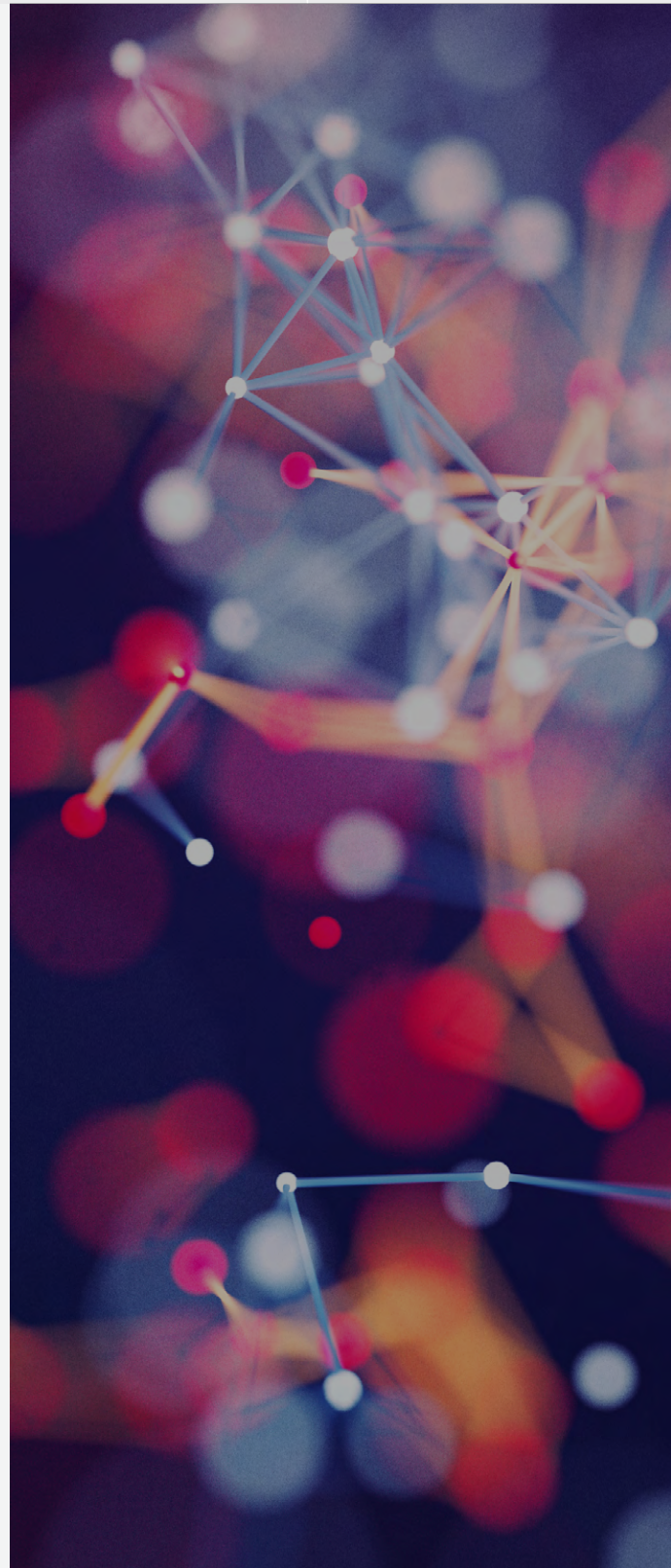
This is a pivotal moment for ABM, but not a simple one for marketers.

An effective ABM programme – one that gets the right content to the right people at the right moment – requires a joined-up approach. It needs close collaboration between sales and marketing, senior level buy-in, the adoption of new software and processes, intelligent measurement and a long-term view of success.

Marketers have told us they struggle in almost all of those areas, with their three biggest challenges being scaling up ABM, confusion over the best approach and aligning sales and marketing.

Providing a logical and sequential approach to your deployment, full of examples and checklists, this guide will help ensure you take an effective approach to your ABM programme: one that delivers the results you need.

This is the place to start if you're intent on making ABM a powerful component of your strategy.





# Step 1:

## Set your marketing objectives

As with any marketing initiative, the first step in building your ABM plan is to set objectives that will enable you to gain backing and ensure you deliver measurable success.

Plan how to engage each of your stakeholders in these objectives – in particular, the sales team. Make sure your marketing objectives align with your business ones.

The objectives of your ABM programme are likely to be multiple. They may depend on the target account's position in the customer journey. For example, some of your ABM activity may be directed at creating new pipeline, while other efforts may be designed to help move existing leads over the line, up-sell or cross-sell existing client accounts.

### Example ABM objectives

- › Deliver X number of new business face-to-face meetings
- › Deliver X number of account management face-to-face meetings per account manager
- › Deliver X number of pitches
- › Deliver X number of product trials
- › Convert X number of trials to sales
- › Deliver X number of proposals
- › Deliver X value of new pipeline
- › Convert X% of existing pipeline
- › Deliver X value of up-sell /cross-sell revenue
- › Increase average order value by X%
- › Increase average revenue per customer to X
- › Reduce enterprise client attrition rate by X%.

### Three considerations when developing ABM objectives

- 1. Link objectives:** Make the link between business, marketing and ABM objectives explicit. They should not be standalone but all build towards the development of an effective plan.
- 2. Align with teams beyond marketing:** Every successful ABM programme works across sales and marketing functions and, in some organisations, the customer team should also be involved. Work with relevant teams beyond marketing to map out what you each need to achieve – both independently and together. Make sure any objectives related to ABM are identical or, at least, complementary. If your organisation is new to ABM, during these initial objective-setting meetings, you may need to champion a move from lead-based demand generation to account-based insight.
- 3. Set timelines:** To create momentum and be pragmatic, your timelines for achieving objectives need to be achievable. Set them based on your previous experience within the organisation and what is required in order to achieve success.

## Step 2:

# Set targets

Once you know what your ABM programme needs to accomplish, it's time to put some numbers against your objectives.

The numbers may include unitary, monetary and percentage values.

Set them, and review them on a regular basis with your sales team to ensure they are achievable, deliverable and challenging.

### Revenue

Set your financial targets based on your overall objectives and consider:

- › Pipeline value
- › Annual contract value
- › Deal velocity
- › Closed won deals
- › ROI.

### Engagement

Work out your targets based on your previous successes:

- › Your conversion rate
- › Your average deal size
- › Number of leads that led to your current figures
- › Number of touch points that lead to a sale
- › Overall engagement rate.



## Step 3:

# Define your available resources

### 3.1 Team structure

Making ABM work in your business may require a restructure of your marketing team.

Existing roles may need to be re-purposed to incorporate ABM activities and new recruits may also be required. You may want to create a flat team structure for your ABM, or a hierarchical one.

Once you've worked through this guide you'll be clear about the level of resource needed to achieve the desired results. At this stage, focus on auditing your current structure: the people in your marketing team and the potential roles they could play in delivering your ABM plan.

### 3.2 Team skills

The majority of your skill requirements will be specific to your company, products and market. However, ABM does necessitate some specific attributes. These include:

- › Content marketing – planning and delivery
- › Social media marketing – earned and paid
- › Social listening
- › Social selling
- › Personal branding.

Additionally, you'll be calling on your team to provide creative solutions for achieving cut-through with your target accounts, so look for members who are:

- › Creative thinkers
- › Creative visualisers.

### 3.2.1 The skills radar map

This map, originally used in sport to chart players' strengths and weaknesses, is a useful way to assess key skills gaps in your team.

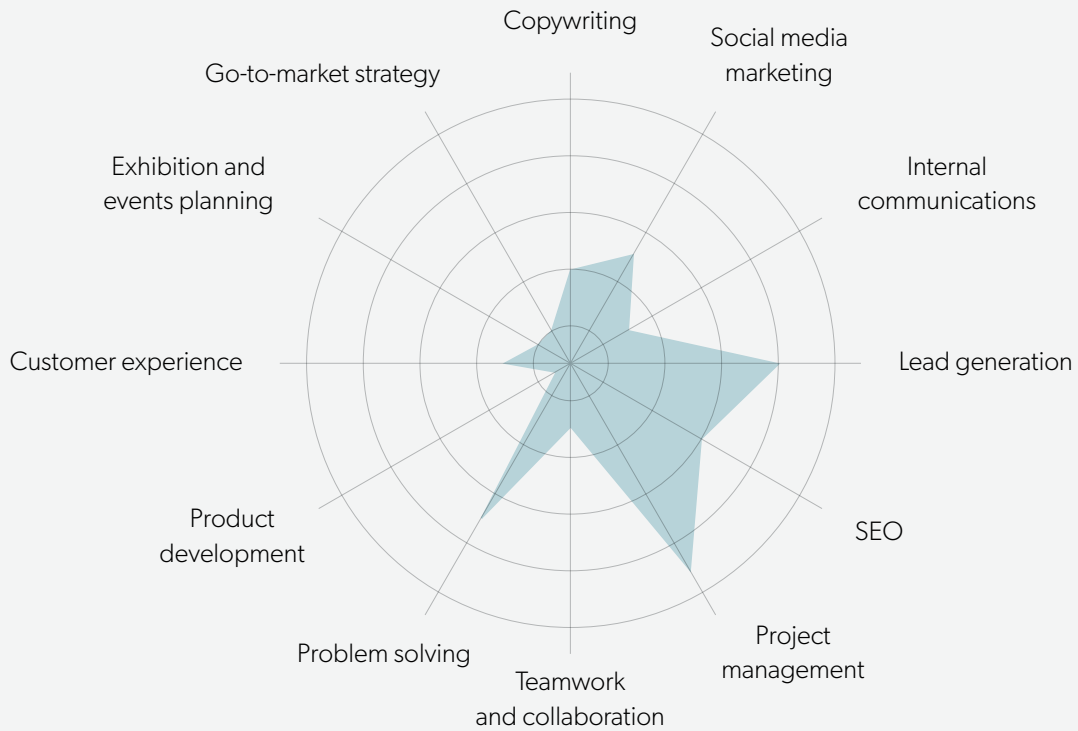
It allows you to map the skills of individual team members against what they could and should be, thus emphasising where further development (or recruitment) should take place.

The employee is then given a numerical score (with 0 sitting at the very centre and the highest score – say, 10 – on the edge). The bigger the overall shape created through the scores, the more skilled the marketer. The map below highlights how this fictional team leader has appraised one of their team member's skills against those that they require.

As you can see from the example below, the team member in question (let's call him Julio) is excelling at lead generation and project management, but falls behind when it comes to customer experience and copywriting. His ability to plan events is also thrown into question.

What his manager can do as a result is draw skills radar maps for their other team members to determine whether a lack of copywriting ability is a problem across the team, or whether it lies with a couple of individuals.

## Julio's score



## Overall team current score



## Required score to achieve team goals



## Skills gap analysis



By overlaying the skills maps for the individual and the team against your requirements, gaps are highlighted.



## Create your own skills map

Use the template below to discover where the gaps lie in your own team – begin by using your preparatory work to draw up your desired skills map before overlaying it with your reality.

Refer to page 6 for our list of suggested ABM skills for your own map.



### 3.2.2 Analysing the gaps

By comparing two skills maps you'll be able to easily identify what gaps need plugging. It's obviously important to ask yourself:

- › *Are gaps being revealed across the whole team or with particular individuals?*

If the majority of the team needs up-skilling in a particular area, you can embark on training (either individual or team).

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*"Determining your available budget before you build your tactical plan will save a lot of rethinking"*

### 3.3 Team capacity

In addition to the structure and skillset of your team, there's a bottom line that needs to be identified: capacity.

Do you have enough bandwidth in your existing marketing team to deliver your ABM plan?

What's the team's available and spare capacity? Which objectives and activities could be shelved in order to free up space? Should additional workload be recruited or outsourced?

Define capacity before you go ahead with building your tactical plan.

### 3.4 Budget

Depending again on the ambition of your ABM plan, your objectives, market and business, it's likely that a specific marketing budget will be needed to deliver ABM.

#### **This may cover:**

- › Additional human resource – in-house or outsourced
- › Team/individual skills training
- › Marketing initiatives
- › Tech.

An ABM budget may mean a reallocation of existing budget, or arguing the business case for additional budget, based on delivering the targets outlined in Step 1 of this guide.

Determining your available budget before you build your tactical plan will save a lot of rethinking.

## Audit your resources

Five considerations for auditing your resources

- 1. Team:** What does your marketing team structure look like? Is it fit for purpose? Who will work on the programme? How much capacity do they have? What are their skill sets and what skills are missing? What training can be undertaken? What is possible within those boundaries, both to start with and by the end of year one?
- 2. Partners:** What skills or expertise can you leverage from your agency, or agencies, to plug gaps in the internal team? Do you need their assistance for set-up or for advanced expertise?
- 3. Technology:** What technology stack do you need to be able to create the programme you want? How can you ensure it enables you to distribute personalised, automated campaigns with effective measurement? There is more information on the technology that fuels ABM in our downloadable guide, [ABM tech evolution: How and when to deploy technology for account-based marketing](#).
- 4. Budget:** What do you need to spend on ABM to make it a success? Based on the costs of your ideal technology stack, consider how much you can realistically spend on content, retargeting, agencies, training and so on.
- 5. Maturity:** Where are you now on the [ABM Maturity Index](#) and how can you get where you need to be?

## Step 4:

# Define your target accounts

Your ABM target account list will form the basis of your ABM activity.

The size and shape of your target account list will vary, depending on:

- › The objectives you set
- › The targets you set
- › Your team capacity
- › Your budget
- › Your market and products/services
- › Your competition
- › Your sales team size and capacity.

The process of defining your ABM target account list – the criteria by which you rate, rank and choose each account – is not dealt with in this guide. Instead, we'll be publishing further guidance on this separately.





## Step 5:

# What your marketing team will actually do

Your ABM programme will be all about engagement – connecting with the key purchasing contacts in your ABM accounts.

A good deal of that engagement will come from your sales team and the account managers charged with delivering against ABM accounts.

Your marketing team will also provide a great deal of that engagement and will assist the sales team with theirs.

That's what this guide is for – to show what engagement might look like so you can be much clearer about what to expect of your marketing team, and how they should spend their time.

### Follow these steps...

1. Research and document key aspects of target accounts and contacts.
2. Plan and create personalised content for target accounts.
3. Share personalised content across specific channels.
4. Create additional supporting content.
5. Plan and deliver face-to-face engagement.
6. Plan and deliver hospitality.
7. Plan and deliver incentives and empowerment initiatives.
8. Plan and monitor target ABM account CX across the business.

## 5.1 Research and document key aspects of target accounts and contacts

Once you've agreed your target account list and contacts, you need to conduct some research.

You're looking to identify the key business issues, pain-points, challenges, core beliefs and resonating topics that relate to both the account as a whole and the individuals within it.

Record these against each account and contact, in a place that is easily accessible to both sales and marketing. (This intelligence will be updated on a regular basis as your sales team engage more closely with key contacts.)

Make sure you've captured key demographics including industry, size and shape of organisation, job roles etc.

### Personality types

In addition to pain points and issues, the personality types of your ABM contacts matter.

People respond differently to various forms of engagement. There are subtle hints you can find to help you tailor and personalise your ABM activity around your contacts' emotional drivers.

That may mean adjusting your choice of marketing channels and techniques to attract the contact's attention, or refining the way you write your copy to suit your target's preferred style.

Social media activity in particular can provide clues on how to garner an ABM contact's attention.

Some of your contacts may be more concerned with their personal brand, so consider plans to help nurture it.

Some use social media primarily to network and socialise, so you may want to help them meet new people.

Others may be interested in particular topics or content formats, and you can adapt the content you create and share with them, to fit these patterns.

### Analysing language

You can also analyse the way your ABM contacts use language on social media as an indication on how to best communicate with them. Although you can learn to do this yourself, there are numerous tech tools, such as the AI-powered Crystal Knows.

### One of three categories

To help with your activity and content planning, consider categorising your contacts into one of three divisions, based on the analysis above:

- › Socially led
- › Content led
- › Ego led.

The cheatsheet below illustrates how you can tailor your ABM engagement around these categories:

Activity	Socially led	Content led	Ego led
Personalised content		✓	
Share the content they've already made		✓	✓
Content collaboration or interview		✓	✓
Gifts	✓		✓
Ask for content ideas		✓	✓
Networking drinks	✓		
Roundtables	✓	✓	
Speaking opportunities	✓	✓	✓
Event guest passes	✓	✓	

## 5.2 Plan and create personalised content for target accounts and contacts

Based on the findings from your research in section 5.1, your ABM team's next job is to plan and create personalised content that speaks to the challenges and issues you've identified.

Content may take different formats, according to the subject and target audience. Look at exploiting rich media for your ABM content, including:

- › Video
- › Webinars
- › Podcasts
- › Interactive infographics
- › Landing pages/microsites
- › Whitepapers/templates /toolkits
- › Research
- › 'Cool ideas'.

Based on available resources and capacity as defined in Stage 3, your team will be creating a calendar of personalised content that targets specific accounts, contacts and their specific needs, challenges and attributes.

What are 'cool ideas'? This is where your team's creative thinking skills come into play. What can you send your ABM contacts through the post that's personal, speaks to their challenges directly and can't be ignored?

## 5.3 Share personalised content across specific channels

Depending on the scale of your ABM list and programme, the majority of content sharing may happen via your sales team and their social selling activities and engagement.

Nonetheless, consider the following channels for sharing the personalised content your team has created:

- › Email
- › Remarketing
- › Social
- › Social retargeting
- › Display retargeting
- › Direct mail
- › Face-to-face

## 5.4 Create additional supporting content

Sales enablement is a fundamental aspect of ABM. Alongside creating personalised content for ABM outreach, your marketing team should focus on creating supporting material and content for your sales team.

Think about creating a library of supporting content that relates to the key issues and conversations your ABM sales/account managers are having with your accounts.

Your aim is to empower account managers with highly relevant and engaging content they can share reactively and proactively as part of their social selling and ABM outreach activity.

## 5.5 Plan and deliver face-to-face engagement

A key aspect of your ABM programme may be face-to-face engagement. For example, breakfast meetings, seminars, workshops, roundtable discussions, private dining meetings, and conferences.

Your ABM team will be required to plan for and deliver these events.

## 5.6 Plan and deliver hospitality

ABM is about nurturing. And in many cases, corporate hospitality can play a key role in the nurturing process.

### Hospitality planning

Including targeted, well-thought-out hospitality in your ABM programme can have a hugely positive impact on achieving your objectives.

This part of the programme is driven by what you know about your programme members personally, whether through feedback from sales and account management teams or data you have collected.

Although, there are considerations to cover first, though.

### Step one: Make sure it's okay

Some employers may have a strict ban on employees receiving any form of personal reward.

So before you send your first reward, check with the recipient that they and their employers are okay about it.

A quick email should do the trick. Let your programme members know that as a brand you like to invite valued customers to hospitality events and send out a bit of swag now and then. Ask them to let you know if they'd rather not be included in this.

### Keep it reasonable

Corporate hospitality is included in the remit of both the Bribery Act and the Foreign Corrupt Practices Act, but only where it's deemed to be 'disproportionate' or 'lavish'. So the rule of thumb is to keep things 'reasonable' and 'proportionate'.

You'll know what these terms mean in relation to your industry, sector and market. Private jet holidays to the Seychelles for ambassadors are likely to be rewards that could be seen to cross the line. Lunches, small Christmas hampers and the odd goody bag would not.

### Keep it targeted

It's smart to target your programme rewards as much as possible, depending on membership size, your budget and resources. If, for example, you know that half your programme members identify themselves as 'outdoorsy' while the other half are more 'indoorsy', you could invite one half to an afternoon of grouse shooting and the other half to cheese and wine tasting.

### Keep it on brand

Remember that your rewards programme needs to reflect your brand – its personality traits, values, tone and positioning. Consider your brand keywords when you're working it out.

The following list of keywords shows how seven different brand values could lead to seven quite different hospitality experiences.

- › Aspirational
- › Creative
- › Quirky
- › Irreverent
- › Innovative
- › Cheeky
- › Traditional.

### Keep it in budget

How much you are willing to invest should be set against how much value you place on achieving your ABM programme objectives.



## Step two: Plan your events schedule

### Your hospitality calendar and plan

With all these considerations covered, you're ready to draw up a hospitality plan and calendar.

It may include the hospitality events you plan to invite ABM programmers to and the rewards you plan to send out.

For example:

- › Christmas party
- › A quarterly lunch with their account manager
- › Private dining, with an informal presentation from a key industry figure
- › Easter egg
- › Summer party
- › A birthday message and gift (if you've collected your contacts' birth dates in your research)
- › Miscellaneous small gifts.

## Step three: Work out costings

Put a cost against each line and total your planned hospitality costs, then refine or expand this to fit your allocated budget.

### 5.7 Plan and deliver incentives and empowerment initiatives

It's important you consider focusing your ABM programme on professional as well as personal rewards. Covering both bases means you can connect with your programme members on more than one level.

For example, these may include:

- › Exclusive previews of new products, features or services
- › Exclusive, pre-launch free trials, beta tester access
- › Priority pre-order purchase opportunities for new product/feature/service launches
- › Complimentary tickets to any paid-for-events you hold.

Once again, the size of your contact size and available resources will help inform what you're able to do here.

### 5.8 Plan and monitor target account CX across the business

Of course all your clients should enjoy a great customer experience. But if any of them should get a truly outstanding service, it's those in your ABM programme.

Single out each contact and business for special treatment. Make sure their experience of your sales process, product and service is so great they can't help but forge loyalty with your brand.

For detailed guidance on planning and managing your CX, see our [dedicated free guide](#).

# Step 6:

## ABM engagement planning template

### Create the engagement, outreach plan and calendar by ABM account and contact

This working document will drive your ABM activity and success.

#### Use this ABM engagement planning template:

Account	Contact	Demogs	Key challenges & pain points	Personality type	Objective/customer journey point	Personalised content	Date	Hospitality	Date	Incentives	Date
Smith & partners	Peter Smith			Socially led	Existing customer = up-sell	Video on GDPR		Private dining invitation		Beta access to new product	
Smith & partners	Sarah Green			Content led	Existing customer = up-sell	Whitepaper on recruitment		Lunch with account manager		Beta access to new product	
Hale Industries	Steven Gibbs			Content led	Prospective customer	Research paper on R&D		Christmas party invitation		Invitation to speak at annual conference	
Hale Industries	Julia Wright			Ego led	Prospective customer	Video on productivity innovation		Christmas party invitation		Invitation to speak in podcast	

# Step 7:

## Marketing automation

There's an abundance of tech available for your marketing team to use for personalised ABM outreach.

This ranges from email remarketing to display and social retargeting, through to programmatic display and automated ABM at scale. (For detailed guidance in this area see our [ABM tech guide](#).)

### Reporting

Map out who in your organisation needs to be kept up to date on progress.

#### 1. Who are you going to report to?

- › Who needs to be included in reporting if you are to achieve/retain buy-in?

#### 2. What will you report?

- › For each level of the business who'll receive a report, how much information do they need (e.g. KPIs or a fuller picture)?

#### 3. How will you report?

- › Based on the depth of information they will need, which templates or dashboards are needed for each level of the business?

#### 4. Who will report?

- › Who will deliver the ABM results to the board and through what channels? Will it be part of the overall sales and marketing updates, for instance?

#### 5. How often will you report?

- › At what regularity is reporting useful and meaningful?
- › Are there regular meetings you need to feed the results into?

- › Are there regular points in the sale cycle where reporting could help spot trends to jump on?

#### 6. How will you collect feedback and adapt?

- › How will you take on board input from your stakeholders?
- › Who would be most useful for you to see the reports so they can feedback (e.g. call centre and customer service leads will have valuable insights to add)?

#### Final essentials checklist

- › Have you written and agreed ABM objectives that align with your marketing and business ones?
- › Have the right stakeholders, particularly sales, been involved and engaged?
- › Do you know what resources you have and how to make best use of them?
- › Have you got a detailed plan mapped out for the next 12 months based on audience insights?
- › Is thorough measurement and reporting in place?

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