



DEMANDBASE

7 PLANNING ACTIVITIES TO DRIVE ABM SUCCESS

A PLANNING WORKBOOK



Account-Based Marketing (ABM) is more than a campaign or program. To do it well and really make an impact on your business, it requires changes to your organization, your processes, and your technology.

Whether you're a novice or seasoned veteran, this workbook is designed to help you address fundamental considerations for building and growing your ABM practice.

USING THIS WORKBOOK

When embarking on strategic planning, it's important to consider foundational elements of your ABM practice to maximize value in your programs and marketing channels.

This workbook is based on the assumption you have a working knowledge of Account-Based Marketing. While we touch on the basics, if you find yourself needing additional explanation, take a moment to review these ABM resources:

[Account-Based Marketing: Fundamentals Every B2B Marketer Must Know](#)

[Building an Account-Based Marketing Framework](#)

[ABM Certification](#)

TABLE OF CONTENTS

1. DEFINING THE RIGHT KIND OF ABM FOR YOU	4
2. CONSTRUCTING YOUR TARGET ACCOUNT LIST	6
3. DEMONSTRATING SUCCESS	8
4. APPLYING ABM ACROSS CHANNELS	10
5. BUDGETING STRATEGIES	12
6. ASSEMBLING YOUR TEAM	14
7. ASSESSING TECHNOLOGY SOLUTIONS	16

1. DEFINING THE RIGHT KIND OF ABM FOR YOU

There are three distinct types of Account-Based Marketing practices which have broadened its appeal and provided more ways for companies to get started. Two-thirds of ABM-ers are implementing just one approach and only 12% are implementing all three.

One-to-One—A dedicated, senior-level marketer works in full partnership with the account team and creates highly customized marketing programs for “markets of one.”

One-to-Few—Taking the research-based principles of One-to-One and applies them to larger groups of accounts. This approach typically brings together clusters of 5-15 accounts with similar business issues, often in the same industry.

One-to-Many—Emphasizes personalization at scale. This approach typically addresses a strategically curated target account list of several hundred or more named accounts. In order to achieve this level of scale, technology needs to play an important role.

Blending all three

The type of ABM practiced depends on many factors including how valuable the account is or resources available to you. As you plan for your ABM, you should be considering which you want to incorporate. The good news is you don't have to pick just one. According to ITSMA and the ABM Leadership Alliance research, 65% of companies are only doing one type of ABM, yet the highest performing companies have chosen a blended approach.

DIVE DEEPER

To learn more, download the eBook [Accelerating ABM Impact: The Case for A Blended Approach](#).

Companies who implement more than one type of ABM provide an optimal balance between breadth and depth. Few, if any, companies can afford the investment it would take to provide true One-to-One ABM to even a fraction of their accounts. But most companies have at least a handful or two of absolutely critical accounts. Relying on a One-to-Few or One-to-Many approach for those key accounts could mean missing a great deal of opportunity or even risking future revenue by failing to deliver an appropriately customized experience.



Source: ITSMA

PLANNING EXERCISE: SELF-ASSESSMENT

Evaluate how to support your company goals with an ABM lens.

What are your ABM objectives?

Which type of ABM will best support these objectives?

- One-to-one One-to-few One-to-many

Which resources will you need?

ADVANCED CONSIDERATIONS: BLENDED ABM

Consider how ABM can help solve corporate objectives. How can different types of ABM address these common objectives?

OBJECTIVE	ONE-TO-ONE	ONE-TO-FEW	ONE-TO-MANY
Opening new markets in different industries or geographies			
Innovating new solutions			
Developing new reference accounts			
Ensuring customer success			
Changing perceptions or positioning			
Other:			

2. CONSTRUCTING YOUR TARGET ACCOUNT LIST

A target account list consists of the companies with the most potential to your business—which can include customers, prospects, or partners (or a mix of all three). The target account list helps to align your resources, create shared focus across sales and marketing, and facilitate compliance.

While many companies have a target account list, it is often created by sales and thrown over the wall to marketing, but having a list is not enough. Since the target account list at the center of ABM, it's crucial that the list contains the right accounts.

Approaching the list-building process

Evaluate Current Customers—Evaluate your current customer base and create a lookalike model

Leverage Named Accounts—Including verticals and strategic accounts

Use Data—Generate a list of companies, and then have a discussion with your sales team to validate a set of target accounts

Use Account Identification Technology—Determine the high-value accounts most likely to buy and best individuals within those accounts

Once you've built out your list, it's time to break it up into segments. The segments you select require discrete business objectives that marketing can use to build specific programs to support.



DIVE DEEPER

To learn more, download the eBook, [Building Your Target Account List](#).

PLANNING EXERCISE: HOW DOES YOUR LIST MEASURE UP?

Scrutinize your list based on the answers to your questions below.

1. What is the ideal profile for your buyers (industry, revenue range, employee range, etc.)?

2. What factors determine your most valuable customers?

3. What factors would indicate possible buying interest (e.g. Trade show attendee, new hires, web site visits, demo requests, content download)?

4. What current year business objectives would direct you to address certain segments of your target list sooner rather than later?

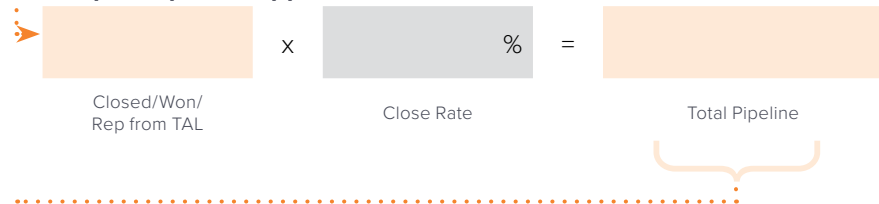
ADVANCED CONSIDERATIONS: IS YOUR LIST THE RIGHT SIZE?

This size of your list can impact efficiency. This calculator will help determine what you should shoot for.

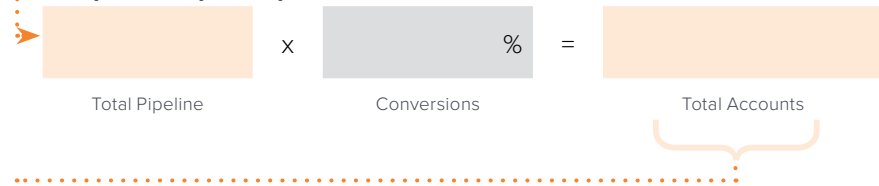
Step 1: Closed/Won per Rep



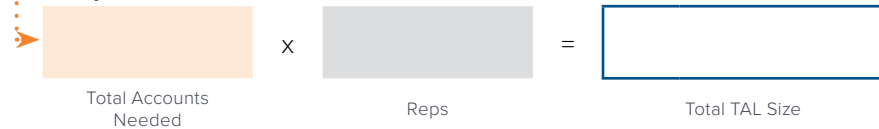
Step 2: Pipeline Opportunities



Step 3: TAL per Rep



Step 4: Total TAL



You may need to do separate calculations for different parts of your sales team such as SMB, Enterprise, Verticals, etc. and add them up to get your total Target Account List.

3. DEMONSTRATING SUCCESS

Don't waste your time adopting Account-Based Marketing if you can't adequately measure. It's simply not worth the effort to identify your accounts, gain alignment with sales, and market to a select group of accounts if you can't pivot from quantity-based channel metrics to quality-based account-based metrics. Demonstrating success is rooted in an Account-Based Marketer's ability to tie ABM programs with business outcomes.

Leading and Lagging Considerations

In order to demonstrate success, you need to set a baseline for each of your key metrics. Consider setting a few in each type of indicators—leading and lagging.

Leading indicators—Metrics that help you determine the effectiveness of your campaigns.

- MQLs
- Downloads
- Conversions

Lagging indicators—Metrics that show business outcomes; maybe the most important since you'll use these to determine the overall success of your ABM strategy.

- Win/loss rates
- Annual contract value (ACV)
- Average sales price (ASP)
- Funnel velocity
- Customer lifetime value (LTV)

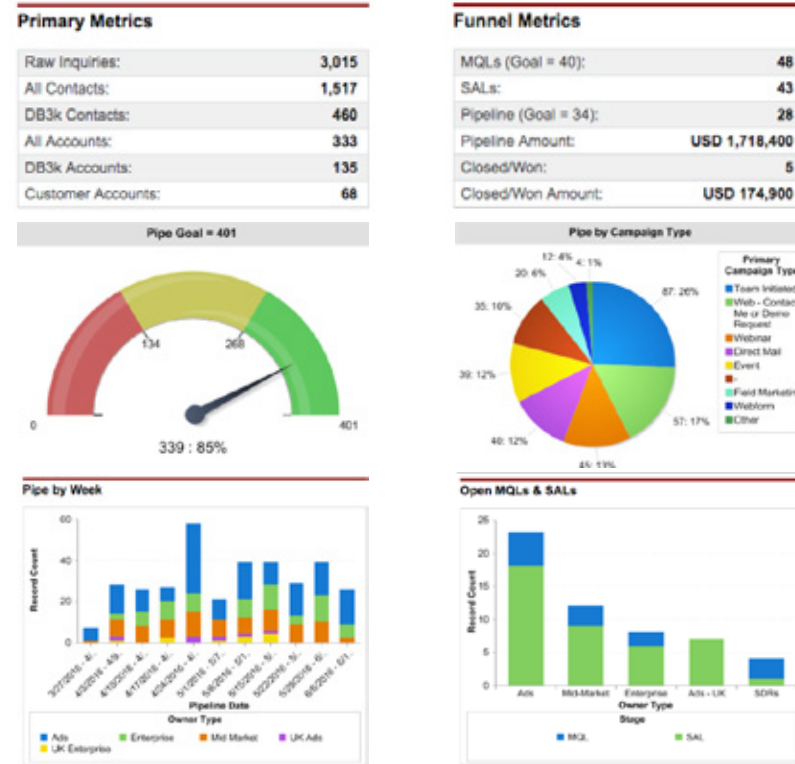
DIVE DEEPER

To learn more, download the eBook, [B2B Marketer's Guide to Account-Based Measurement](#).

Communicating Wins

Creating a dashboard to share across your ABM team—marketing, sales, and operations—is a great way to communicate overall impact and ROI of your campaigns, maintain alignment, and identify areas of opportunity.

Disciplined measurement can provide data that helps the business recognize emerging market trends and opportunities that might prompt changes not just in marketing strategy but in overall business goals.



PLANNING EXERCISE: SET YOUR BENCHMARKS

What are your benchmarks for these key goals?

Win/Loss Rates

% Increasing rates? Yes No

Annual Contract Value

\$ Increasing value? Yes No

Annual Contracts from Direct Marketing Sources

\$ Increasing value? Yes No

Marketing Supported ACV-Rate

% Increasing rates? Yes No

Funnel Velocity

List your funnel stages and the average time spent on each:

ADVANCED CONSIDERATIONS: METRICS ASSESSMENT

Evaluate each of your market functions through an account lens to help you determine metrics gaps and effectiveness.

Website

% Visits from target accounts

Target accounts per quarter

Pages per session for target segment

% Conversion rate of target segment

Demand generation

Target accounts attending live and digital events

Target accounts engaged with advertising; channels driving to site; opportunities demand is driving

Field marketing

Number of target accounts attending events

Number of opportunities driven by Field Marketing

Cities with the highest concentration of target accounts:

4. APPLYING ABM ACROSS CHANNELS

“I did a direct mail to target accounts and called it ABM.” Some marketers start their Account-Based Marketing journey with a few go-to channels which are easiest to adapt. But like this marketer realized, ABM is much more than a single channel. All your marketing can be adjusted to be account-based. The result? More efficient and higher performing channels.

ADVERTISING

Display advertising is often thought of as a top-of-the-funnel tactic, focused on driving awareness and generating a large number of leads. But under an ABM umbrella, advertising campaigns become more strategic, narrowed down to target a specific set of accounts – making a bigger impact and reducing spend.

ABM the channel by purchasing ads just for your target account segments with personalized messaging. Measure whether each campaign resulted in lift to your website and engagement from those key accounts. Consider measuring “cost per engaged account” to determine the effectiveness of your ABM ad budget.

WEB MARKETING

The website is one of our most important channels but we’ve treated all visitors the same and created a one-size-fits-all experience. In an ABM world, we can identify the accounts visiting the site and tailor the site to their needs.

ABM the channel by incorporating your target segments for analytics and user experience. Add them to your analytics to isolate high-value visitors and study their behavior, engagement, and conversion patterns. Optimize their experience with segment-based personalization driving quickly to relevant content. Start by tweaking existing content and messaging while you build out a library of custom-made assets.

Events and Webinars

These channels cast a wide net and fill your funnel but if you adjust your plans to adopt an account-based strategy, it will lead to more high-quality leads that get to your sales team faster. The end result – fewer, higher-value events and increased ROI.

ABM the channel by evaluating events and webinar opportunities which have a high crossover of attendees from your target accounts. (TIP: If you’re evaluating something new, ask for a previous event’s attendee list.) Make sure Sales has event leads as soon as you get them and create CRM reports showing registration of their target accounts – 30% of webinar opportunities can come before it even happens!

FIELD MARKETING

Just because Field Marketing is aligned with Sales doesn’t mean it’s account-focused. Plans are often derived based on Sales or regional requests rather than focusing on overall ABM strategy.

ABM the channel by mapping the locations of your target account list and using this as a way of proactively creating your strategy. Create a list of cities you can reasonably cover based on your budget and headcount and tier the list based on account density. Build programs in conjunction with Sales to help establish a consistent presence within your key cities, run programs that provide momentum, and satisfy pipeline generation.

DIVE DEEPER

To learn more, download the eBook, [ABM is a Team Sport](#).

PLANNING EXERCISE: CHANNEL AUDIT

Are you leveraging the right channel mix? Consider your ABM program goals and audit your programs and tactics.

Define ABM Program Goals

- Identify leading and lagging indicators
- Shift the mindset to an Account-based perspective

Establish a Baseline

- Define ABM program goals
- Establish baseline of current tactics
- Review target account list

Evaluate Tactics

- Focus demand generation activities on accounts vs. leads
- Ensure program alignment with Sales
- Utilize account-based strategies to prioritize which Events to attend or sponsor
- Create a target account list for webinars and direct mail campaigns

Measure and Iterate

- Schedule meetings
- Meetings and phone calls completed
- Pipeline closed

ADVANCED CONSIDERATIONS

If you've already implemented the right channel mix, are there opportunities to optimize the mix?

Optimize Current Mix

- Leverage partners for a coordinated campaign
- Audit your existing content
- Monitor target account social media activity
- Segment your website audience and personalize experiences

Measure and Iterate

- Calculate ROI
- Identify high-value segments
- Initiate Sales team follow-ups

5. BUDGETING STRATEGIES

ABM can be done on a shoestring budget or the costs can be covered by other programs. But when you're planning, it's important to know where you will be spending your money. The bulk of ABM costs fall into two categories—technologies and programs.

Technologies

Technology helps to automate processes and scale your ABM strategy. It isn't a silver bullet, nor is it one-size-fits-all. You could have all the technology in the world, but if you don't have a plan for each piece (or an understanding of how your entire stack fits together), you won't be successful. A better way is to evaluate your current processes to identify problems and opportunities.

Programs

When it comes to ABM, one of the first questions marketers always ask is: "How will this impact the programs I'm already running?" While we'd like to say everything is going to stay the same and you'll magically be doing ABM, the truth is, there will be some change to your existing programs.

Approaches to Budgeting

At most companies, the budgeting cycle for a new strategy takes place well in advance of the final goal setting and program planning. This leaves marketers who are ready to execute on ABM challenged to determine how to finance the change.

The good news is, there are approaches you can take to mitigate the challenges:

Run an experiment—Most organizations set aside some budget to try new things. If you're one of them, you can use your experimental budget to test ABM initiatives and technologies.

Roll it up—Another viable option is integrating ABM into existing categories of your marketing budget. For example, if your Director of Web Marketing is already working on a website relaunch, perhaps rolling a personalization solution into the existing proposal.

Split costs with Sales—You can approach budgeting for ABM in a more creative way by splitting the cost of certain technologies with your Sales team. Since Sales and Marketing alignment is a big piece of an ABM strategy, you'll want to invest in technology to make the processes that go into making that relationship successful more efficient.




DIVE DEEPER

To learn more, download the eBook, [Budgeting Strategies](#).

PLANNING EXERCISE: BUDGET CHANGES

It's important to know how your budget will be changing. Think hard about how ABM will impact each channel based on your objectives.

SPONSORED EVENTS	
	Before ABM Lots of events, small budget for each
	After ABM Fewer events, more budget
	Guidance Budget is reallocated to account-based events
	Your Plan
	% Change
FIELD MARKETING	
	Before ABM Low-touch events across country
	After ABM Increased high-touch events in key territories
	Guidance Budget is re-allocated to account-based programs
	Your Plan
	% Change
WEBINARS	
	Before ABM Educational webinars focused on product and thought leadership
	After ABM No change
	Guidance No change to webinars, increased sales follow up
	Your Plan
	% Change

ADVERTISING	
	Before ABM Untargeted advertising campaigns
	After ABM Focused advertising campaigns geared toward a set of accounts
	Guidance Budget decreases
	Your Plan
	% Change
DIRECT MAIL	
	Before ABM Wide-reaching direct mail programs
	After ABM More high-value direct mail campaigns
	Guidance Budget increases
	Your Plan
	% Change
CONTENT CREATION	
	Before ABM Broad-scale content program
	After ABM Focused content creation for key segments
	Guidance Budget is reallocated to account-based content
	Your Plan
	% Change
CONTENT SYNDICATION	
	Before ABM Focus on lead volume, with low conversion rates
	After ABM High conversion rates from target accounts
	Guidance Budget decreases
	Your Plan
	% Change
WEBSITE	
	Before ABM One experience for all website visitors
	After ABM Unique, personalized experience for target accounts
	Guidance Budget increases
	Your Plan
	% Change

6. ASSEMBLING YOUR TEAM

Account-Based Marketing can be mistaken as a marketing-exclusive initiative. While marketing may be the key driver, Marketing, Sales, and even Operations need to be working together at all stages of the funnel.

Marketing and Sales should have strategic alignment based on organizational goals, but you must also support operational alignment to ensure performance, process, and technology are part of the model.

It's important to understand what the individuals in your Marketing, Sales, and Operations teams care most about. What their objectives are and what they're trying to achieve. From there you can position ABM as a way to achieve greater results together. New ABM initiatives often

start with good alignment but over time, players change, expectations shift, and opportunities to stay connected decline. It's important to periodically re-assess the team and connection points.

DIVE DEEPER

To learn more, download the eBook, [Aligning Sales and Marketing](#).

	SALES	CUSTOMER SUCCESS	MARKETING	FINANCE	OPERATIONS
ROLES	Uses customer insights to inform marketing focus and programs	Focuses on extending ABM into the customer lifecycle	Brings a focus on pipeline and revenue objectives for identified accounts	Provides insight on key business goals	Facilitates alignment and collaboration using data
RESPONSIBILITIES	<ul style="list-style-type: none"> Resets expectations Matches territories with target account list Sets accounts 	<ul style="list-style-type: none"> Defines areas of focus Develops marketing programs Adopts "marketing mindset" 	<ul style="list-style-type: none"> Determines the main metrics for ABM success Re-focus marketing activities 	<ul style="list-style-type: none"> Aligns teams using business metrics 	<ul style="list-style-type: none"> Creates models, benchmarks, and reporting to align sales and marketing

PLANNING EXERCISE: IDENTIFY YOUR TEAM

Using the table, identify the names and roles of Marketing, Sales, and Operations leadership to put together your working team. Identify their top pain points or priorities to see where ABM can unite the team.

MARKETING LEADERSHIP	ROLE AND PRIORITIES
SALES LEADERSHIP	ROLE AND PRIORITIES
OPERATIONS LEADERSHIP	ROLE AND PRIORITIES

ADVANCED CONSIDERATIONS: ALIGNMENT

Evaluate mechanisms for ensuring alignment.

Meetings

What meetings have you established to discuss ABM strategies and effectiveness? Examples are a funnel working group such as sales or marketing.

Frequency

List the cadence for check-ins and dashboard distribution

Information Sharing

List the ways you share information transparently, the information you send and receive, what information you wished you had, and what teams are not engaged that should be.

7. ASSESSING TECHNOLOGY SOLUTIONS

Despite what you might hear from some tech vendors, you can't buy your way into an ABM strategy. And with thousands of technologies out there, it's easy to get overwhelmed or buy something you can't use or doesn't work as desired.

Technology decisions must be driven by your strategy and deployed to fix specific issues. It's important that you determine the right use cases, needed resources, and success metrics before you sign on the dotted line. Those defined objectives and use cases will help you quickly see the value and demonstrate ROI making future investments a much easier sell.

To determine where to plug in technology, it's best to break the options down into categories and prioritize which areas are proving to be the most cumbersome or provide the biggest opportunity for success.

Infrastructure

This is one area most marketers have covered and includes your CRM, marketing automation system, and content management system. While the basics are working well, they may still be driving contact-level data and may need to be tuned with additional technology such as lead matching to help you act first on accounts and then on contacts.

DIVE DEEPER

These are just a few. To see the full list of criteria of vendor selection, download the eBook, [ABM Technology: A Guide to Choosing the Right Vendor](#).

Account Selection

Account selection tools are those that enable you to identify and rank best fit target accounts at scale. Leveraging a tool that has artificial intelligence to identify your best fit accounts and prioritize them based on intent can expand your addressable market of accounts far beyond just those who look like your current customers. Additionally, technology can save you valuable resources when it comes time to update and optimize your list.

Engagement

Engagement tools enable you to connect with your target accounts and include social media, advertising, content, and events. The key is finding the technologies which will allow you to control your audience to your target account list, personalize the experience, and find out where your audiences are in their journey.

Sales Enablement

Without a sales enablement solution, more and more of your leads—even those from your target account lists—will go untouched. That's because the sales reps don't have the insights they need in order to reach out to the lead. Invest in tools that offer your sales team contact development and enrichment as well as actionable insights to help them identify, reach, and tailor their outreach to the buying committee.

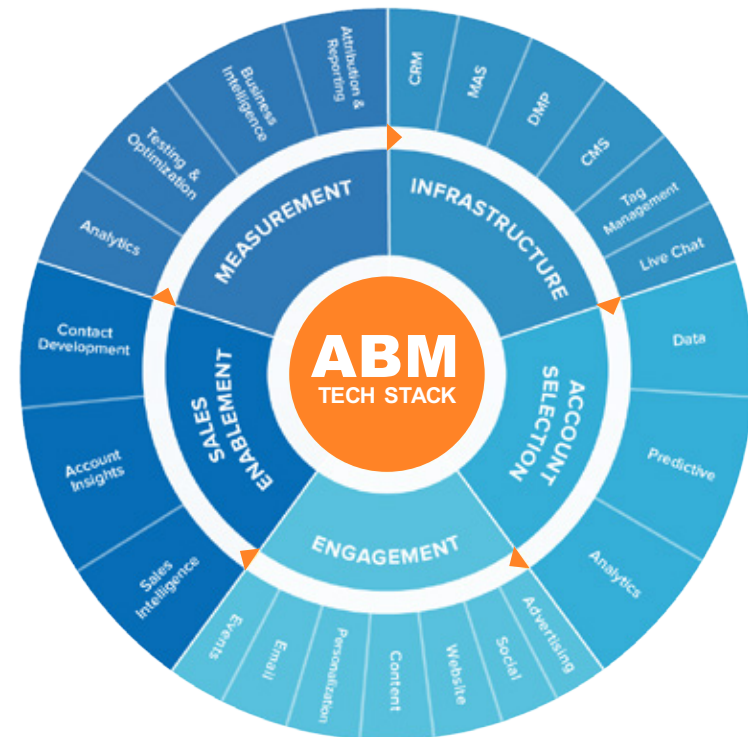
Measurement

Measurement is at the heart of ABM. If you can't tie marketing efforts to business results or pivot from lead, session, and click metrics to account-metrics, you'll need to invest in measurement technology. These will help you see which of your target accounts are coming to your website, conduct account-based optimization tests, or get visibility into marketing program attribution.

PLANNING EXERCISE: TECHNOLOGIES IN PLACE

Using the technology wheel, identify which technologies you have, which you want, and the severity of the pain you're experiencing. This will help you determine where you should invest.

TECHNOLOGY	HAVE	WANT	PAIN INDEX
Infrastructure			<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
Account Selection			<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
Engagement			<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
Sales Enablement			<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
Measurement			<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low



ADVANCED CONSIDERATIONS: USE CASES

For the technologies identified above with high pain index, document a set of use cases and success metrics which will help you quickly determine the ROI for your purchase.

TECHNOLOGY:				
USE CASE 1:				
USE CASE 2:				
USE CASE 3:				
SUCCESS METRICS:				

CONCLUSION

Success with Account-Based Marketing is predicated on a solid strategy – and revisiting that strategy periodically. Focusing simply on scaling ABM tactics is great but it's not enough. Including your ABM strategy as a key part of the marketing planning process will give you time to evaluate what's working and where adjustments are needed to increase your marketing efficiency.

DEMANDBASE

Demandbase, the leader in Account-Based Marketing (ABM), has been introducing ABM solutions to the market since 2011. The company offers the only end-to-end ABM platform – account identification, account-based advertising, B2B website personalization, account-based marketing automation, sales insights and integrations into CRM so that ABM results are optimized around sales activity. The Demandbase B2B Marketing Cloud is the only subscription-based ad targeting and web personalization solution that let marketers connect campaigns directly to revenue. The B2B Marketing Cloud is powered by patented technology, which allows companies to identify in real-time the accounts they value most and personalize their digital marketing efforts to them. Enterprise leaders and high-growth companies such as Adobe, GE, Salesforce.com, Oracle, Box, CSC, DocuSign, Dell and others use Demandbase to drive ABM and maximize their marketing performance. The company was named a Gartner Cool Vendor for Tech Go-To Market in 2016. More information can be found at <https://www.demandbase.com> or by following the company on Twitter [@Demandbase](https://twitter.com/Demandbase).

