Direct mail-powered ABM guide

by

Reachdesk

with insights from:

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Welcome to your direct mail-powered ABM guide!

If you ask ten different people to describe what account-based marketing (ABM) is and how to execute it well, you'll likely receive ten different answers.

There are many moving parts to ABM, so whether you're an ambitious beginner or a seasoned strategist, it can feel like you're chasing your tail.

Regardless of experience level, everyone has questions about how they can improve performance. In this guide, we'll deep dive into direct mail-powered ABM, and take you on a journey from the necessary basics to the key secrets to make it an essential (and successful) part of your business strategy.

First things first: what is ABM?

A business marketing strategy that concentrates resources on a predefined set of target accounts within a market, using personalized and integrated campaigns to engage each account.

The steps in your ABM journey

CHAPTER 1

The Foundation

1.1 Strengthen your relationship with sales

Before you launch any account-based GTM strategy - and to guarantee your success - you need to build a strong foundation. The first step in doing so is making sure Marketing, Sales, AND Operations are aligned.

Sales teams play a pivotal role in ABM, as they help identify priority accounts, nurture decision-makers, and close deals. Without Sales, your strategy will be driven solely by marketing – and that's not the ABM way.

Here are a few things you can do to create a powerful partnership between marketing and sales and set yourself up for success:

01 Set Expectations

Establishing shared targets, KPIs and processes is key to leveling up expectations and building a strong partnership from the get-go.

Define qualification criteria: Work with your Sales team to define what accounts should be included in campaigns, based on pre-defined criteria.

Establish shared goals and KPIs: Make sure both teams are aligned on campaign goals, and define achievable and shared KPIs.

Set SLAs and response times: Create a written SLA document with clear roles, responsibilities, and timeframes for actions (e.g. follow up with qualified accounts).

Align on usage of tools: Establish which tools should be used and when. Having user-friendly, time-saving tools (such as Reachdesk AI) can increase your team's adoption and facilitate your processes.

02 Arrange touch points & communicate openly

Schedule regular meetings with the Sales team to share campaign updates, performance data, and new insights and to hear feedback that can help guide or improve your campaign. Make sure both teams are working from and have visibility over the same dashboards and reports.

03 Flag engagement

Your team needs to be aware of activity from their accounts, so they're able to follow up and create a leaner buying process. To guarantee this happens, you should:

- Define clear engagement criteria and determine what counts as meaningful engagement
- Agree on a hand-off process for sales-ready accounts.
- Implement an account scoring system that assigns values to engagement actions and prioritizes accounts based on their level of intent.
- Set up notifications and alerts that trigger when accounts reach a predefined intent score, indicating they are ready to speak to your sales reps (i.e. MQA stage).

? What is an MQA? (Marketing Qualified Account)

An account that has significantly engaged with your company and product offering, to the extent that they are deemed "in market" and ready for sales outreach.

MQAs have:

- Engaged with high-value web pages (e.g. your pricing page)
- Multiple personas visiting your website
- Consumed content and/or attended events
- Researched topics related to your offering on the web

Mason Cosby, Founder, Consultant & Podcast Host at Scrappy ABM, says...

The reason why many ABM programs fail is that teams go too big too quickly. Marketing might spend six-plus months building ABM programs in a silo, so when they bring it to Sales, it doesn't resonate.

Sellers think week-to-week, and marketers think quarter-to-quarter. I've seen marketing teams attempt to launch ABM with exhaustive, six-month programs that simply don't resonate with their sales counterparts.

For marketing teams, the initial focus should be on meeting sellers where they are by building out an activation play that can lead to an ABM program. This should nail down the fundamentals and the handoff process between the two teams.

- **How do we activate our Sales team?**
- **How do we provide quality people to reach out to?**
- **What is the right messaging?**
- **What's the right timing to deliver our messaging?**

1.2 Identify your key accounts

After bringing your partnership with sales to life and agreeing on processes and goals, it's time to start defining your target account list, based on your pre-determined ICP.

Ideal customer profile (ICP)

This defines the firmographic and behavioral attributes of accounts that are expected to become your most valuable buyers, stay loyal to your brand, and advocate for your product down the line.

You don't want the Sales team to choose accounts at random, but you also don't want to be dictating which ones they'll work on. There needs to be alignment and consensus. So instead of selecting accounts, Marketing should define criteria for accounts to be included in campaigns, share that broadly with Sales, and let them choose which specific accounts (matching the pre-defined criteria) they want to focus on. This process guarantees that you target the right accounts, at the right stage, with the right messaging.

Your criteria can be based on:

Internal and External Sources

Your sales and CS teams
They'll help you uncover commonalities amongst active customers and identify the best-fit prospect accounts.

CRM data
Look at your customers' data. Which ones have the highest LVT? What do they have in common?

Customer's competitors
It's fair to say that if one company in a specific industry needs you, their competitors will too.

Competitor's customers
Browse your competitor's G2 and Capterra pages and read reviews from current customers. This can help you identify unsatisfied customers who are likely looking for an alternative.

Your campaign goals
If you're focused on increasing win rates, you don't want to target cold accounts.

IRL, this is as simple as pulling out a report from your CRM, using the filters you've defined, sharing the list you got with your Sales team, and providing them with instructions on how to choose the accounts and how to inform you (you can use CRM tagging for example).

And don't forget to ask your ops team for help...

Berk Ozden, Senior Data Analyst at Mural, breaks down the reasons why...

Efficient use of insights

Your Sales team know the most about the market and personas that they sell into and speak with every day. Operations must receive those insights so they can incorporate them into their data-driven model and build the most robust account lists.

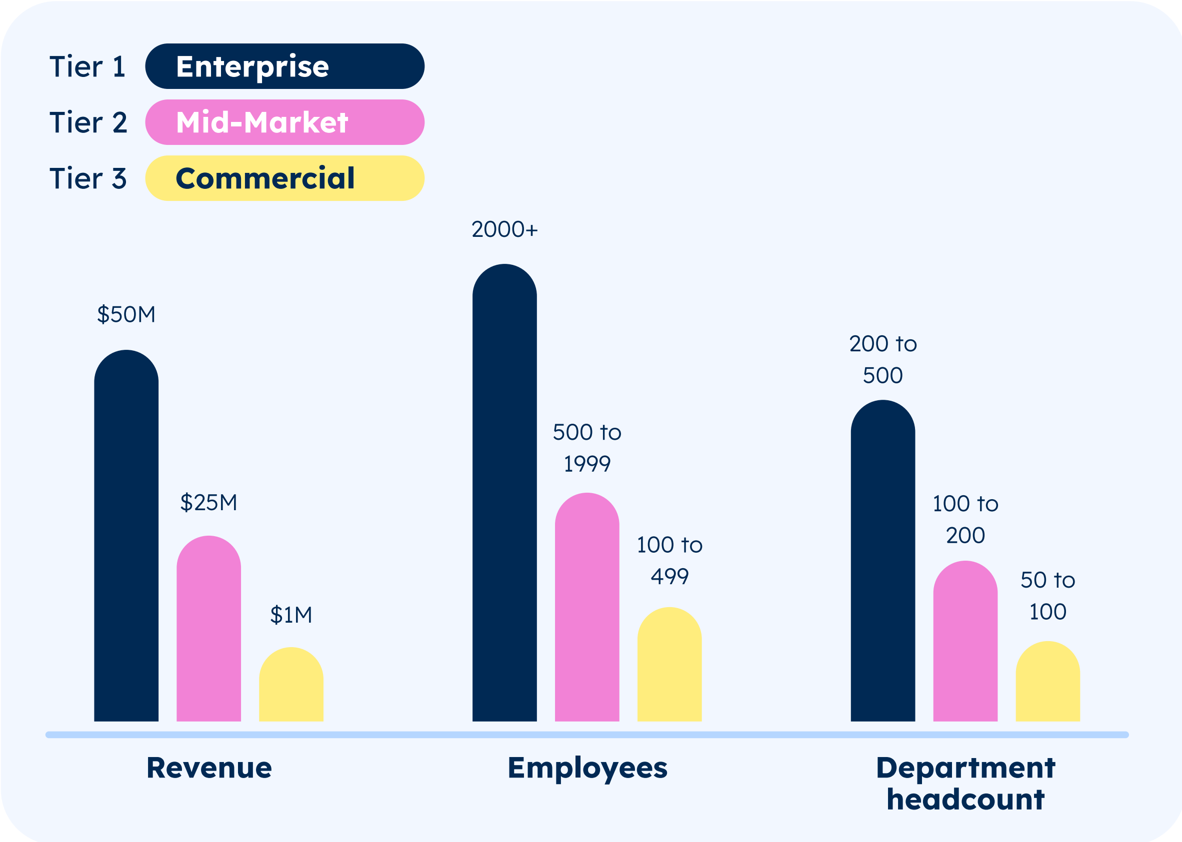
Data quality and alignment

Typically, Operations owns the data sources that contain account-specific information, but there might be other sources that Sales use to help them make decisions around targeting. These teams need to align on which data sources will be considered when building account lists. Any discrepancies can lead to confusion and inefficiencies in the ABM strategy.

Once the Sales team has chosen their accounts (that should match your pre-defined criteria), you'll be left with a strong and diverse list. But these accounts won't all be in the same stage of their buyer journey, and won't all have the same priority for your team. This is where tiering comes in.

You can bucket accounts into tiers based on their attributes, defining which are the highest priority ones, and therefore which will receive the most investment and attention.

For example, if you sell software, this is what your tiers could look like:



1.3 Identify your key decision-makers

Now that you know which accounts you'll be working on, it's time to define who exactly you'll be targeting, as it is as important to focus on account engagement as it is on key persona engagement.

To find out more about who your key stakeholders are and what their roles in the buying process might be, collaborate (again!) with your GTM team and ask questions about the people involved in the last ten to 20 deals your team won, such as:

- Who was involved? What were their job roles or functions?
- At what point in the process did they become involved?
- What is their role in the decision-making process?

While this can vary, the similarities and overlaps between the organizational structures in your target account list will be evident – and some may even surprise you.

Once you've created a list of potential decision makers, you'll need to prioritize them based on their level of influence and the potential impact they could have on the purchasing decision. This will help you tailor your ABM efforts and target your messaging to the right people.

There's a wealth of tools available to help you unlock your buyer personas and put actual names into each account next to their relevant buyer persona – including LinkedIn's Sales Navigator, Apollo, Cognism, and ZoomInfo.

CHAPTER 2

The strategy

2.1 Group your accounts and define their tactical eligibility

Accounts are tiered and key stakeholders are identified: it's finally time to start looking at the tactics that will be part of your campaign.

But first, let's look at what types of ABM strategies you can choose from:

One-to-Few

A single light-personalization approach for a group of tier 2 accounts that share similar characteristics (e.g. industry, pain point, region).

One-to-Many

A strategy that targets multiple lowest priority/cold accounts, using personalization at scale.

One-to-One

Unique and highly personalized programs for specific tier 1 target accounts or late-stage funnel ones. These are usually resource and time demanding, however they also generate the highest ROI.

Account tiers and engagement stages can help you define the ABM strategy most relevant to each set of accounts. Moreover, take into consideration your business's goals, team's bandwidth and available tools when making a decision.

While in a perfect world you would create multiple campaigns simultaneously covering different stages of the funnel and different account tiers, in reality doing so is a bit more challenging. So sometimes selectivity is needed.

Here's how certain account's attributes can influence their tactical elegibility and strategy allocation.

	1:1	1:Few	1:Many
Number of accounts	10-50	50-200	200-500
Tier	1	2	3
Account Size	Enterprise accounts with large buying groups	Mid-sized accounts	Small accounts
Engagement stage	Late stages of the buying cycle	Pre-opportunity stages	Pre-engagement stages
Product use case	Complex or custom use cases that require ultra-tailored solutions.	For several accounts that share similar use cases.	For common use cases that can be addressed with a more generalized approach.
Industry	Accounts in unique or niche industries.	Groups of accounts within the same industry that face similar challenges.	Multiple accounts across various industries, but with shared characteristics.
Resource availability	Requires significant resources and a dedicated team.	Less resources needed to offer light personalization to dozens of accounts.	Less demanding approach, allowing teams to target hundreds of accounts at once.

2.2 Select your strategies

Based on your target account tiers AND buying stages, you'll have a different set of ABM tactics (with different levels of personalization) available to you:

Tier 1
High priority accounts 1:1 ABM eligibility = account-level personalization

Content marketing
Landing pages, videos, one-pagers and case studies.

Digital advertising
Ads featuring account logo and specific messaging

Messaging
Tailored to specific pain points and key desired outcomes

Organic Social
Direct engagement with key accounts' decision-makers

Outreach
Highly personalized and focused on relationship building.

Direct mail
Account relevant, eye-catching, and engaging.

Events
Small-scale events curated for key accounts' pain points.

> In a typical six-month sales cycle, I've used 1:1 ABM for the 3-5 biggest deals we need to close the following quarter. Work with your AE Managers or Head of Sales to select and plan these in advance and make sure you're starting at the optimal sales cycle stage and building a repeatable process for launching quarter after quarter.

Amber Bogie, Director, GTM & Account Based Innovation, GoTo

🎁 Gifting Powered Campaign Idea

Goal: Revive stalled deals at key accounts

Campaign idea: Re-engage champions by sending a personalized gift based on relevant account data (e.g. award won, relevant milestone, etc), through a personalized landing page experience, that shows key buyers your creativity and thoughtfulness. Initiatives like this will surprise your champions, showcase your people-first approach, and help you close more deals.

Gift type: Personalized bundle

Integrations: Salesloft. Outreach CHILI PIPER

💡How Reachdesk can help:

Our global team of project managers can help ideate, source, and send personalized bundles across the globe, enabling you to create a seamless experience for key accounts, no matter where they are in the world. We handle all the logistics for you, so you can focus on what matters most: generating revenue.

Tier 2
Priority accounts, 1:Few ABM eligibility = industry/persona-level personalization

Content marketing
Self-guided demos, product webinars, buyer's guides, case studies

Digital advertising
Relevant but high-level messaging, focused on job roles or industries

Messaging
Tailored to persona/industry pain points and product benefits

Organic Social
No specific engagement with certain accounts

Outreach
Light-level personalization outreach cadences

Direct mail
Industry/persona relevant

Events
Participate in and sponsor persona or industry conferences.

Leanne Chescoe, EMEA Marketing Director at Demandbase, says...

> When mapping out personalized communications with customers, I always ask myself, 'Why would my customer care about this?' Think about how you can add value to their investment in your solution. This is where I leverage channels such as our community, virtual user groups, and customer-specific content.

🎁 Gifting Powered Campaign Idea

Goal: Multithread to stakeholders within key accounts

Campaign idea: When working warmer and large accounts, multithreading is key. Create eye-catching direct mail campaigns (e.g. matching socks or beach towels) for relevant account stakeholders and enable your team to engage with the extended buyer group and open more opportunities, faster.

Gift type: Marketplace gift

Integrations: Salesloft. Outreach HubSpot

💡How Reachdesk can help:

Leveraging our integration with Hubspot, you can create trigger-based direct mail sends for when key accounts reach certain engagement scores or sales stages. Choose from one of 4000+ global gift options and engage with key contacts at scale, without the logistic hassle.

Tier 3
Low-priority accounts, 1:Many ABM eligibility = light personalization at scale

Content marketing:
Guides, ebooks, podcasts and webinars, games and quizzes

Digital advertising
General and focused on your overarching value proposition

Messaging
Overarching ICP value proposition

Organic Social
As part of the overall marketing strategy

Outreach
Auto-triggered and focused on general selling points

Direct mail
Used as a relevant physical campaign touchpoint

Events
Attend large flagship events your ICP usually attends.

🎁 Gifting Powered Campaign Idea

Goal: Nurture cold accounts

Campaign idea: Pique prospect's interest by adding an eGift to an auto-triggered cadence, along with a relevant piece of content. For guaranteed success, allow your prospects to easily book a meeting with your sales team, directly from the gift claim page.

Gift type: eGift

Integrations: Salesloft. Outreach HubSpot CHILI PIPER

💡How Reachdesk can help:

To make sure your team can save time while sending gifts at scale, our dynamic link feature is the way to go. You can create a single link for your campaign, paste it into Salesloft or Outreach emails, and done! +3500 eGift options at your key contacts fingertips - with minimum effort.

Stefano Iacono, Marketing Director, Europe at 6Sense, says...

> With the right integration and a cohesive tech stack, personalization (whether at scale or not) isn't just a goal – it's a reality.
>
> Here's our foolproof approach:
>
> - ✔ **Select the best accounts:** Focus on what matters – who you personalize for.
> - ✔ **Know about them:** Understand their unique needs.
> - ✔ **Engage the right way:** Make the connection count.
> - ✔ **Collaborate with Sales:** Teamwork makes the dream work!
> - ✔ **Track real stuff:** Measure what truly impacts success.

ABM and events

If your GTM teams regularly attend events, you can make them even more effective by adopting an ABM lens:

Account selection: In advance of an event, prioritize the key accounts you want to engage with. Gather content and messaging that is relevant to each account's interests and challenges. Don't forget the speaker and sponsor lists too!

Prepare personalized outreach: You can break the ice with a prospect before you've even met face to face by sending them a personalized gift pre-event, with a note saying you're looking forward to speaking with them.

Nurture prospects post-event: Organize post-event nurture workflows to guide potential accounts through the sales funnel.

Assign account owners: These individuals will be responsible for providing a personalized experience before, during and after the event.

Create post-event outreach: Tailor your follow-up content based on your conversations at the event, referencing the prospect's specific interests and concerns.

Analyze and measure engagement: Track the engagement and interaction of target accounts before and during the event. Analyze post-event data to assess the impact on pipeline and revenue.

CHAPTER 3

The Tools

Now that you have the whom, the what, and the why, all that's left to do is to define the how!

But beware - there's no singular, centralized tool that guarantees success. ABM requires the combined efforts of many teams, supported by different platforms.

Besides, you will have different needs depending on where you are in your ABM journey. For example, 6sense is a tool for mature ABMers and you'll want to ensure you're in the right stage of maturity, because only can you maximize the impact and value of a tool like this.

Some of the more mature ABM tools often come with a hefty price tag, so it's wiser to hold off until you've built your foundation and know exactly what you need.

To evaluate your needs and choose your ABM tools, Mason Cosby, from Scrappy ABM suggests a Crawl, Walk, Run approach.

Stage of Maturity: **Crawl**

How to define?

You're just getting started and your company hasn't heavily invested in ABM yet. You also have a low budget to spend on ABM tools.

What tools?

Get creative with tools you already have in your arsenal, such as:

Hubspot, to build personalized landing pages and chatbots
Zoom/Teams, to host your virtual events

And of course, leverage free tools:

Propensity, to build account lists & deanonymize website traffic
Apollo, for account enrichment
Canva, to design your visual materials

Stage of Maturity: **Walk**

🔎 How to define?

Your ABM program has been up and running for a while. You've already managed to prove its effectiveness and are now unblocking some added budget to take your strategy to the next stage.

🛠 What tools?

It's time to take intent seriously with tools like:

6sense or **Clearbit**, for identifying accounts based on engagement signals

Demandbase or **Terminus**, for account-level targeting, personalization, and ABM orchestration across multiple channels

Stage of Maturity: **Run**

🔎 How to define?

ABM is a natural part of your GTM strategy, but there is still room to grow. You're now figuring out how to optimize it and make it truly impactful.

🛠 What tools?

The ultimate step is automated hyper-personalization that scales:

Uberflip or **Pathfactory**, for content personalization

Navattic, for personalized self-guided tours of your platform

Reachdesk, for hyper-personalized direct mail

Davis Potter, CEO of ForgeX, says…

> When choosing ABM software, the first thing you should do is audit your existing ABM framework and identify areas where MarTech solutions will either fill a gap or amplify what you have. Where a lot of ABMers go wrong is thinking that you should purchase a MarTech solution first, and then build your framework and strategy around what it will provide.
>
> Once you have a strong foundation in place, you should look at platforms or tools that can help augment your tactical efforts. An ABM platform can provide first-party intent data and reporting, while other tools such as Reachdesk or Mutiny are great at empowering your tactics to scale.

CHAPTER 4

The Metrics

Early indicator metrics for ABM

When measuring at an early stage, you and your leadership team will want to perform a comparative six-month retrospective analysis of:

- Target accounts pre-ABM efforts
- And/or non-target accounts without ABM marketing support

You'll find the differences are significant pre and post-ABM - but what metrics should you focus on?

- Account engagement
- Deal velocity
- Content engagement
- MQA creation and conversion
- Account progression

Metrics to focus on later on

- Pipeline velocity
- Deal conversion rate
- Account expansion
- Account coverage
- Return on investment (ROI)

To learn more about how to define each of the above metrics, take a look at our glossary.

Proving the impact of your ABM strategy without sourced attribution can be difficult, but there are some alternative metrics you can use to highlight your successes.

Account-level metrics: Including account-level engagement, progression, and expansion.

Case studies: Document and share success stories from target accounts.

Surveys and feedback: Gather insights from target accounts.

Pipeline contribution: Even without sourced data, you still can see the impact of your ABM efforts with influenced data.

Sales feedback: Ask how ABM efforts have influenced closing deals and account relationships.

Stefano Iacono, Marketing Director, Europe at 6Sense, says...

Our research shows that the key to a successful ABM campaign lies in understanding and measuring both the pipeline and revenue influence on your target accounts.

With that being said, I recommend metrics aligned to this, whether leading indicators (such as accounts reached and accounts engaged) or KPIs (such as pipeline generated/influenced, and revenue generated/influenced).

Metrics by campaign type

Net-new campaign

Engagement rate

Pipeline contribution

Late-stage funnel campaign

Customer Acquisition Cost (CAC)

Close won rate

Deal velocity

Deal size or revenue impact

Customer Campaign

Product usage/adoption

Retention rate

Upsell and cross-sell opportunities

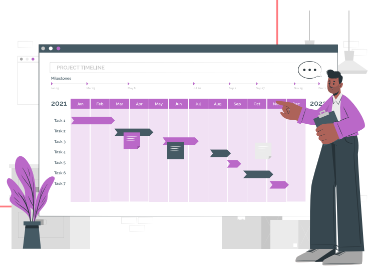
Customer satisfaction

Advocacy campaign

Advocacy actions

Referral opportunities

Advocacy ROI



BONUS TIP: How to define the budget for an ABM strategy

Customer Acquisition Cost (CAC): Ultimately, the goal of ABM is to make deals close faster and help your CAC decrease. Look at your usual CAC and decide on how much you need to decrease it by.

Goal alignment: Ensure the budget aligns with specific campaign objectives, such as acquisition, retention, upsell, or advocacy.

Resource allocation: Allocate resources for personalized content, ads, events, and direct outreach to target accounts. Will you need to hire freelancers to produce ads? Book venues for events? Include any direct mail spending?

Team needs: What resources and tools does your team need to succeed? For example, new software licenses, upgraded hardware, or agency support. Put budget aside specifically for analytics, reporting, and ongoing optimization to track campaign performance and ROI.

Potential ROI: Prioritize high-value accounts and segment them by priority based on potential revenue. This will help you ensure that the budget is being used most efficiently and directed at the most likely to convert.

Sofia Silva, ABM & Demand Gen Manager, **Reachdesk**

Achieve ABM excellence

Wherever you're at on your ABM journey, we hope our guide has inspired you and your GTM team to work closer together and deliver an exceptional ABM strategy.

01

The Foundation

- Strengthen your relationships with sales by setting expectations, communicating openly, and defining clear processes
- Define your ICP and target list based on your goals, external and internal information
- Identify your key stakeholders and prioritize them based on their level of influence on purchasing decisions

02

The Strategy

- Group accounts and choose your tactics (and the level of personalization) based on attributes such as account size, engagement stage, use cases, industries, or resource availability
- Identify where target accounts are in the sales funnel, select your approach (One-to-Many, One-to-Few, or One-to-One), and channel mix
- If you include events as part of your strategy, don't forget to adopt an ABM lens

03

The Tools

- Establish an order of need and priority for your ABM tools
- Ensure your strategy is at the right stage of maturity with each tool you take on

04

The Metrics

- Early on, compare target account engagement pre-and post-ABM efforts
- Use metrics relevant to the types of campaigns you're measuring
- Pay special attention to CPO, conversions, opportunities, and deal velocity.

For more insights into ABM and beyond, subscribe to our monthly Unwrapped newsletter.

If you're ready to take your ABM campaigns to the next level and build stronger connections with target accounts, get in touch with us today!

ABM Metrics Glossary

ENGAGEMENT

Account engagement

How are target accounts interacting with your marketing efforts?

How many new website visits, content downloads, email opens, and event sign-ups?

Content engagement

How frequently are target accounts interacting with personalized content and for how long?

Engagement Rate

What's the level of interaction with target accounts?

How many MQAs has your campaign generated?

How many meetings were booked as a result?

Account coverage

How many stakeholders at each account are engaged with your campaigns?

CONVERSION & PIPELINE GENERATION

MQA creation and conversion

How many MQAs have you created?

What is the conversion rate to opportunity compared to your previous conversion or MQL conversion rate?

Account progression

How many target accounts advance through the sales funnel stages and at what rate?

Pipeline velocity

How quickly are opportunities moving through the sales pipeline?

Faster pipeline velocity is generally indicative of an effective ABM strategy.

Pipeline Contribution

Are your conversion rates from each stage to closed won above the benchmark?

How much has your campaign influenced in net new pipeline?

REVENUE

Deal conversion rate

How many qualified opportunities eventually convert into paying customers?

High conversion rates demonstrate that your ABM efforts are effectively targeting the right accounts at the right time and resonating with their needs.

Close Won Rate

What percentage of key target accounts are becoming customers?

Is the percentage higher for accounts targeted with ABM campaigns?

Return on investment (ROI)

Ultimately, ROI is a critical metric.

Are the resources invested in your ABM strategy yielding profitable returns?

Calculating ROI involves comparing the campaign's costs against the revenue it generates.

Customer Acquisition Cost (CAC)

What is the total business cost of sales and marketing efforts required to acquire new customers?

Deal Velocity

What is the total time it takes for key accounts to become customers? Is it higher or lower than your business averages?

Deal size or revenue impact

What is the total revenue impact from your ABM campaigns?

What is the annual contract value for accounts targeted with ABM campaigns?

POST-SALES METRICS

Account expansion

How are accounts' spending growing over time?

Successful ABM strategies can lead to cross-selling and upselling opportunities within existing accounts, contributing to account expansion.

Product usage/adoption

How many customers have been onboarded and are fully engaging with your product?

How many are using more than one product feature?

Retention rate

How many existing customers have you retained or renewed through the campaign?

Upsell and cross-sell opportunities

What is the number of opportunities, pipeline, and ACV for upselling or cross-selling to existing customers?

Customer satisfaction

What's the difference in customer satisfaction before and after they've been targeted with your campaign?

What is your NPS pre and post-campaign?

Advocacy actions

How many new referrals, testimonials, social mentions, or case studies have you gotten as a result of the campaign?

Referral opportunities

How many opportunities were generated through customer referrals?

Advocacy ROI

What is the return on investment from advocacy-driven revenue and referrals?

Reachdesk

@ReachdeskHQ

G2 Reviews

reachdesk.com