The ABM 101 guide

by

Reachdesk

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Welcome to your ABM 101 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 around how they can improve performance. In this guide, we'll explain the basics of ABM and share our secrets for making it a consistently rewarding part of Reachdesk's business strategy.

If you look up ABM, you'll find…

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.

Contents

01 Build your target account list

Ideal customer profile (ICP)

This defines the firmographic and behavioral attributes of accounts that are expected to become your most valuable prospects and customers that are also most likely to buy, stay loyal to your brand, and advocate for your product.

Buyer personas

Within your ICP, there are numerous individuals in a variety of roles that you will need to connect with and sell to. These are called buyer personas.

A marketing qualified account (MQA) is...

An account that has engaged with your company, across your buyer personas and seniorities, to the extent that they are deemed in market and ready for sales outreach.

Or, if you use a tool such as 6sense or Demandbase, an MQA is...

An account that has engaged both with your company and around the web on intent relating to your product offering to the extent that they are deemed “in market” and ready for sales outreach.

MQAs have:
- ✔ Engaged on high value web pages
- ✔ Multiple personas visiting your website
- ✔ Consumed content and/or attended events

Before you get started with target account selection, make sure...
- ✔ Your ICP is formalized with your go-to-market (GTM) team
- ✔ Your Sales and Operations teams are aligned

Develop your priority target account list

While the purpose of ABM is to be as targeted as possible, you don't want to put all your eggs in one basket straightaway.

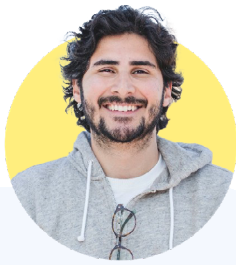
Start with an extensive list of relevant accounts you can engage across a range of marketing initiatives and that sales can manage in their account books, based on your ICP. Don't be shy – list as many as you can!

Browse your competitor's G2 and Capterra pages and read reviews from their customers to understand how happy they are. This can be a time-consuming process but also highly rewarding when you identify unsatisfied accounts that are likely looking for an alternative solution!

You should also look at your own customer's competitors. It's fair to say if one company in a set industry needs you, the others will too.

Speak to your Sales teams and Customer Success managers so you can uncover the factors that compelled your recent customers to choose your company, as well as which accounts are renewing with you, and which ones have the highest lifetime value.

Sales + Operations = Quality account lists



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

Efficient use of insights

Your Sales team knows the most about the market that they are selling into and speaking with everyday. It's crucial that Operations receives those insights so they can incorporate them into their data-driven model in order to build the most effective account lists.

Data quality and alignment

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

Tier your account list

Once you filter your priority account list, you'll be left with a strong list that's not quite as targeted as you need. Well, this is where tiering comes in.

Your accounts will fall into one of three tiers depending on how aligned they are with your company's priorities and focus – whether that's industry, size, largest revenue impact, or simply the best fit for your product. Your highest priority tier will receive the most investment and attention, while your lowest priority tier should receive more general and automated outreach. This will allow you to focus your efforts where they're most needed.

	Tier 1 1:1	Tier 2 1:Few	Tier 3 1:Many
Email campaigns	Personalized	General	Industry pain point
Landing pages	Personalized to the account	Personalized to the industry/persona	N/A
Targeted ads	Personalized to the account	Personalized to the persona at certain industry	Personalized to the industry
Events	Intimate roundtable/ dinners/spa days	Roadshow-style events	N/A
Direct mail/ gifting	Personalized to the account/person	Personalized to the industry/pain point/ seasonality/ campaign messaging	N/A

02 Identify your decision makers

Collaborate with your GTM team and ask questions about your last ten to 20 deals, tracing each sales process from start to finish:

- 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.

Leverage your existing personas

Work with your Operations, Sales, and Customer Success teams to answer questions about accounts that are now clients, including:

- What challenges did they face when choosing your solution?
- Has that changed or what new challenges do they face?

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.

03 Strengthen your relationship with Sales

Sales teams play a pivotal role in ABM campaigns by identifying, nurturing, and closing high-value accounts. Without them, your strategy will be driven solely by Marketing – and that's not the ABM way. Here are a few ways to set up a powerful partnership between Marketing and Sales.

Set expectations

Establish service-level agreements (SLAs) in four easy steps...

Define qualification criteria: Work together to define the attributes of accounts that should be included in your campaigns.

Set response times: Agree on timeframes for Sales to follow up on qualified accounts.

Document processes: Create a written SLA document with clear roles and responsibilities.

Prioritize communication: Maintain open communication channels for seamless collaboration and performance monitoring.

Arrange touch points

Schedule regular meetings with your Sales team to share updates, performance data, and any new insights. Make sure your teams are working from the same dashboards and reports in your CRM platform, such as HubSpot or Salesforce.

Marketing and Sales should create account dossiers that identify buying groups and key buyers at an account, as well as that account’s KPIs, goals, initiatives, and any more tidbits that can be used for serious personalization.

Flag engagement

Define clear engagement criteria: Establish specific criteria to determine what counts as meaningful engagement.

Implement MQA scoring: Create a scoring system to assign values to engagement actions, prioritizing accounts based on their level of interaction.

Automate alerts: Set up notifications that trigger when MQAs reach a predefined engagement score, indicating they are ready to speak to your Sales reps.

Agree on an account handoff process: Develop a clear and seamless process for handing off Sales-ready accounts to the Sales team.

04 Select your strategies

Top-of-funnel (Awareness stage)

At this stage of the buyer journey, ABM teams strive to spread awareness and educate B2B buyers on challenges they might not even be fully aware of yet.

As TOFU is about engaging and warming up buyers within target accounts, it benefits most from a 1:Many approach.

1:Many ABM: A single approach for numerous target accounts. We recommend this approach for your lowest priority targets or your TOFU targets with little-to-no engagement as the personalization and lift is much lighter here.

Engage, Discovery

Campaign inspiration

Goal: Improving meeting show rates for discovery calls

Campaign idea: Pique your prospect's interest by sending them a hand-picked piece of content that's relevant to their needs. Pairing this with a voucher for a coffee and sweet treat to enjoy while consuming your content could be the icing on the cake.

Gift type: eGift

Integrations: Salesforce, HubSpot, Marketo

How Reachdesk customers do it:

> **Sending prospects a coffee before a meeting has been super valuable for us. It's not a flashy gift, but it's been part of every campaign we've run and it's always well received.**

Read the story

Luke Fagg
UK Team Lead, Field Marketing
CoachHub

Content marketing

Producing and sharing relevant content doesn't just help you start conversations – it shows your target accounts that you understand the nuances of their industry and can be trusted to solve their biggest challenges.

Everyone consumes information differently. When mapping out your ABM campaigns, it's best to engage with audiences across a variety of channels and touchpoints – organic content (social media, podcasting), thought leadership (blogs, eBooks), and event content (speaking slots, webinars). That being said, a 2022 survey of B2B buyers found they overwhelmingly preferred video (55%) and webinar (54%) content.

Website content is as valuable as ever at the TOFU stage. But since your goals here are very much centered around creating awareness, the most effective content is often external – including social media, influencer marketing, podcasts, and speaking slots at events.

TOFU-friendly content:

- Social media
- Influencer marketing
- Podcasts
- Speaking slots at industry events
- Guides
- eBooks
- Webinars

Today's B2B marketers are differentiating themselves from the competition by:

83% Delivering content quality

72% Covering untapped topics/stories (CMI)

Targeted Ads

These can be vital in getting your target accounts from having no awareness of you to the top of the funnel.

As you're engaging 1:Many accounts with no personalization whatsoever, group these accounts in different "buckets" and create relevant ads based on their industry needs, tier, or geography. While you may not be personalizing your account outreach, your ads can still be relevant and targeted.

Traditionally, targeted ads on Google and LinkedIn require a significant amount of work and optimization, while yielding inconsistent ROI.

But 6sense display ads offer dynamic segmentation and complete control of how much you spend on advertising campaigns, when they run, how often one person can view an ad, and where the advertisements are placed.

Retargeted Ads

When a prospect explores your site, the ideal scenario is that they'll encounter compelling content and convert. But a "love at first site" visit is rare.

People are busy and once they leave your page, all sorts of distractions can suddenly take priority. Retargeting helps remind your prospects of who you are and what pain points you can solve, supporting your brand to stay top of mind.

If your prospect visited your blog page on a specific value prop or pain point, a retargeting ad that builds upon the latest information that they consumed could be the nudge they need to bring them back around. Even if it isn't, you're still getting your brand out there, creating recognition and awareness for word of mouth and their future purchases.

Tailored value proposition

The TOFU stage is traditionally about spreading general brand awareness, but there's no harm in writing a tailored value proposition to account segments.

Work closely with your GTM team to get educated on each segment's specific challenges and goals so you can make your value proposition as personalized as possible. Structure it around these topics and highlight how your product can help in a warm and natural way.

Social selling

This is a valuable tactic for any business. Not only is it another channel for your GTM teams to make connections and build relationships with target accounts, but it can often allow for a more relaxed and even fun way to engage with your prospects.

Focus on platforms that your B2B buyer personas are actively using, such as LinkedIn. Tools like Hootsuite or Sprout Social allow you to track posts, search hashtags and set up listening streams, so that you can be part of the conversation. Oktopost is super helpful for internal advocacy and social selling.

Middle-of-funnel (Consideration stage)

MOFU is about generating, influencing, and progressing opportunities. At this stage, B2B buyers are aware of your brand and have demonstrated an interest in your product or that they're feeling the pain that your product solves.

While MOFU accounts aren't quite ready to evaluate vendors, they're still focused on researching all the ways they can solve their problem. Now is the time to build trust without coming on too strong, so a 1:Few approach is the best option to nurture accounts until they're ready to move to the next stage.

1:Few ABM: A single approach for a select group of target accounts (dozens) that share similar characteristics. This often looks like shared industry, persona and key pain point or product offering. This would suit your mid-tiered targets or middle-of-funnel targets.

Engage, Nurture

Campaign inspiration

Goal: Staying top of mind

Campaign idea: Create eye-catching seasonal campaigns with Reachdesk Marketplace gifts. When temperatures drop, send your prospects some cozy socks to ensure they don't get cold feet. In hotter months, send them a beach towel with your company logo to help them relax on the sand while promoting your brand.

Gift type: eGift

Integrations: Salesloft, Outreach

How Reachdesk customers do it:

> **Using Reachdesk in my sales process has directly impacted $250K worth of closed-won revenue resulting in a 100X ROI. I couldn't live without it. It helps me build stronger champions and close bigger deals, faster!**

Read the story

Jack Neicho
Account Executive
Salesloft

Industry-specific content

As you raise awareness and build engagement, your prospects will start to understand the solutions you offer. This is your chance to truly become a go-to option with content that speaks directly to their industry or the challenges that they face in their role.

MOFU-friendly content:

- Self-guided demos
- Product Webinars
- Buyer's guides (focusing on problem solving)
- Whitepapers
- Custom analyst reports
- Interactive tutorials

Whilst the understanding of customer pain points scored 51% at the start of the process and 52% at the end, 61% of B2B decision makers found it most important during the middle of the sales cycle.

Isoline

Self-guided demos

These give prospects the opportunity to experience your product, test its features, and understand its potential. These are particularly well-suited to the MOFU stage as prospects are curious about your product, but aren't necessarily ready to speak to Sales.

BDR outreach

Now that prospects are aware of your brand, have identified their pain, and understand that you offer something that can help, it's time for them to get to know the people behind your brand. Encourage your BDRs and Account Executives to connect with your target ccounts directly and promote a more personalized and human buying experience.

Gifting is gold

Grab your buyer's attention with a thoughtful gift, accompanied by a note that showcases your personality.

A novel greeting

In a world of relentless phone calls and emails, a short and sweet video message can be a refreshing alternative. Tools such as Vidu and Vidyard enable you to record authentic and personalized videos to send to prospects. This is another great touchpoint to complement with a gift.

Engage on social

Make a habit of reacting and commenting on your prospect's LinkedIn posts. This is an easy way to establish a rapport and stay top-of-mind, in addition to understanding what topics they think about most. When you do eventually reach out, your name (and profile pic) will carry positive connotations.

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.

Bottom-of-funnel (Decision stage)

At this stage, GTM teams aim to seal the deal and close opportunities.

BOFU accounts will have shown a clear need for your product. They should also be interacting with you on a somewhat regular basis, and you may also notice frequent visits to your website. Now is the time to pull out all the stops and deploy a 1:1 ABM approach!

1:1 ABM: Unique programs for a specific target account. This should be preserved for your top-tiered accounts or later stage funnel accounts as this approach takes the most time and resources but has the highest payback. These are often done on a quarterly basis in conjunction with sales selection, with the aim of accelerating and closing high-value deals.

1:1 engagement:

Use personalized outreach strategies, such as direct mail, personalized emails, and custom landing pages, to engage key stakeholders within target accounts. Highlight how your solution can address their unique needs.

Content experience platform Uberflip also offers the ability for marketing and sales to create a 1:1 content hub in minutes – yes, minutes – while also giving you tracking and insights on visitors, content consumed and time of consumption.

Once you know which roles you should be looking for when scouting for decision makers, your target company's LinkedIn page should be your first port of call. From here, you can delve into each person's profile to further understand their role, responsibilities, and career background.

Keep an eye on the content they're sharing and its themes. This will help you pinpoint either the topics they're generally interested in or the professional challenges they're facing. If the individual in question has participated in any thought leadership articles or podcasts, either for their own brand or externally, make sure to consume these to get a flavor of their personality and passions.

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 of Demand Generation, **Reachdesk**

Engage, Deal acceleration

Campaign inspiration

Goal: Reviving stalled deals

Campaign idea: Re-engage champions by sending a personalized gift based on their likes and interests. If they're a Star Wars fan, send them some out-of-this-world merch. Or use our Amazon Rainmaker tool to find them something special and send over the recommendation along with an Amazon voucher to spend.

Integrations: Salesforce, Outreach

How Reachdesk customers do it:

Hokodo is **3x more likely to close deals** when using gifting

Read the story

Case studies

Never underestimate the power of social proof. When a brand showcases their collaborations with successful companies and big logos through a good case study, it instantly bolsters their credibility.

More specifically, real people trust real people, so having access to quotes from happy customers to use across your marketing is gold dust.

Case studies and customer success stories not only help attract new accounts, but also reassure your existing customers that you're still on your A-game and more than capable of solving any potential challenges that may arise.

80% of B2B buyers reference case studies as part of their buying research (Extu)

Top tip

Personalized landing pages are powerful, but a personalized asset can be game-changing for late-stage deals that need a little push to close.

Take one of your more compelling case studies and repurpose the success story for a tier one account. Maintain the narrative while personalizing it to their goals, KPIs and organizational initiatives to demonstrate how you help them with the things that matter.

Amber Bogie's story

Challenge: High-value sales deal that had come to a standstill

Solution: Customized eBook for client

> **On one page, we had the prospect's KPIs and some branded elements, while on the other page, we had a product feature of ours with a customer quote and impact metric. The salesperson handling the account came to me personally and said this asset led to the close of the $1 million annual recurring revenue deal.**

Amber Bogie,
Director of Demand Generation,
Reachdesk

BOFU-friendly content:

- Case studies
- Office hours
- Pricing guide
- Personalized videos
- Custom curated landing
- Free trial/bake-off
- Quick-start guides
- Proactive proposals

Targeted ads

It's time to revive your targeted ads – but this time, tailor it to the specific account by adding their logo and highlighting their pain points. The reaction you want to provoke is "Hey, that's me!"

Product demos

Invite BOFU prospects to join a sales representative for a customized live demo of your product. Give them the chance to address any final questions or concerns that potential customers may have.

Personalized email campaigns

Show your commitment to this potential partnership with nurture email campaigns curated with content that addresses that account's specific challenges to keep them engaged. Use marketing automation to trigger emails based on their interactions and behavior.

Personalized landing pages

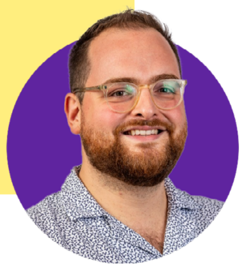
Tailoring landing pages to your top-tier target accounts allows you to carve out messaging and call-to-actions that communicate your value proposition, as well as your understanding of their unique challenges. This can help you impress buyers at a crucial stage, build trust, and boost conversion rates.

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!

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

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.

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

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

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.

05 Group your accounts

On the surface, the type of ABM approach you take for each target account is based on the tier you place them in or the funnel stage they are at. But it's not as black and white as that.

You need to determine which is best based on your organization's initiatives, goals, and your own team size, tools and bandwidth. From there you can make your selections.

Here's how certain target account attributes can influence your choice of motion:

Account size

1:1: For high-value enterprise accounts where personalized engagement is critical to connect with large buying teams.

1:Few: For mid-sized accounts with similar needs, suitable for a more personalized but scalable approach.

1:Many: For small to mid-sized accounts that share certain characteristics or industries, allowing for an approach that's broader but still tailored.

Buying cycle stage

1:1: When accounts are in the late stages of the buying cycle and require deep engagement. Later stages yield more insight from Sales on the account and buyers, allowing for deep personalization and increasing success rates.

1:Few: Suitable for accounts in the mid-stage, where content tailored according to their pain points and personas can accelerate the decision-making process. Topics can include competitor takeout, new to strat, ABM initiative, events play, and ROI.

1:Many: Effective for early-stage accounts where you want to create awareness and start building relationships.

Product use case

1:1: For complex or custom use cases that require ultra-tailored solutions.

1:Few: When several accounts share similar use cases but may require minor personalization.

1:Many: For common use cases that can be addressed with more generalized content.

Account industry

1:1: Suitable for accounts in unique or niche industries that demand a highly personalized approach.

1:Few: Effective for a group of accounts within the same industry facing similar challenges.

1:Many: Ideal for targeting multiple accounts across various industries but with shared characteristics.

Resource availability

1:1: Requires significant resources and a dedicated team, suitable for your most high-value accounts.

1:Few: Balanced resource allocation, offering personalization to dozens of key accounts.

1:Many: More resource-efficient, allowing you to target a larger number of accounts with moderately personalized efforts.

06 Choose your ABM tools

Here's what to bear in mind when building out your ABM budget...

Customer Acquisition Cost (CAC):

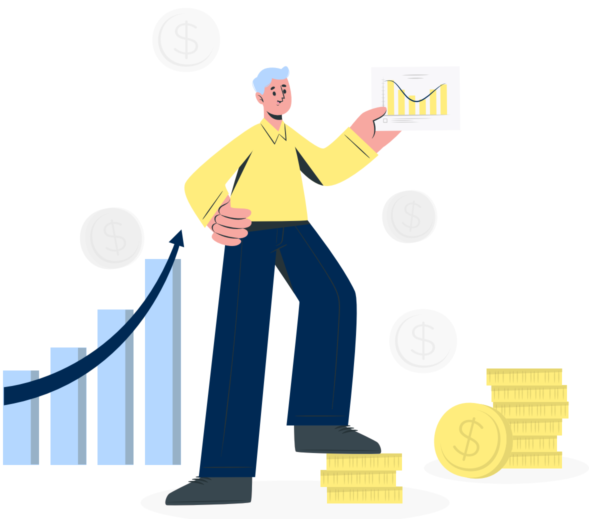
Ultimately, the goal of ABM is to make deals close faster and help your CAC decrease. Look at your usual CAC and decide on how much you need to decrease it by.

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 spend?



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 in the most efficient way and directed at the accounts that are most likely to convert.

07 Choose your ABM tools

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

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 ready for it in order to achieve the most impact and value.

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.

In fact, a towering tech stack is overrated. A recent study from Gartner found that while martech systems are growing, they dipped from a 58% utilization rate in 2020 to 42% in 2022.

ABM on a budget with Mason Cosby of Scrappy ABM

Get creative with your existing tools

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

Zoom/Microsoft Teams

Your day-to-day video conferencing software can be used to host events.

HubSpot

Although not considered an ABM tool, HubSpot has plenty of features that you can get creative with.

Landing pages: Create landing pages with personalization tokens. These allow you to send out personalized landing pages at scale because they update based on the email address they were sent to.

Chatbots: These can be segmented within HubSpot, allowing you to dedicate a different chatbot to a specific industry vertical and account list. When a prospect hits your website, they get a different experience from a chatbot perspective. chatbot, or pop-up.

Leverage free/low-cost tools

Propensity

This is one of my favorite up-and-coming platforms. Propensity's free tier includes important features to get your ABM off to a brilliant start.

1. Build account lists: The free tier limits you to 100 accounts, which you can export on a weekly basis.

2. Track third-party intent data: From 12 different intent sources, including Bombora. These are factored into your account list allowance, so you can pull 100 market intent accounts on a weekly basis.

3. Deanonymize account website traffic: You can look at the traffic on your website and confirm that these are the type of accounts you want to be going after.

Canva

Design LinkedIn ads in a flash with Canva. A Premium subscription is reasonably priced and gives you unlimited access to professional-quality content, but the free tier does the job, too.

Here's a very simple but effective play that any team can run:

- Export 100 accounts.
- Upload them into a contact enrichment tool.
  Apollo offers free enrichment data on a limited basis
- If you have a sequencing tool, create outbound sequencing towards in-market accounts that are showing third-party intent.
  If an account has never hit your website, but they're in-market, you can sequence them.
- If you see accounts hit your website within two to three days of your sequence, you can comfortably assume that they are somewhat brand aware.
- From here, you can follow up with these accounts with more personalized outreach.
- Use your account lists to run account-based ads on Linkedin.

Using intent data to identify who's hitting your website is a great foundational starting point for building into more complex and robust ABM programs in the future.

Once you've proven your ability to run effective campaigns on a minimal budget, it will be easier to make a case for growing your tech stack down the line.

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.

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 silo, so when they bring it to Sales, it doesn't resonate.

Sellers think week-to-week, 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 into 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?**

Is it the right stage of maturity for you?

To understand if an ABM tool is meeting you where you are right now:

Read case studies: Look for success stories on the vendor's website and see whether their customers' circumstances match your own. Mature solutions are more versatile, so check whether they support both 1:1 to 1:Many strategies.

Word of mouth: Read reviews from industry experts and customers. You can even connect with existing users directly to hear more about their experience with the product and whether they're happy with customer service they've received.

Attend product demos: Hear straight from the horse's mouth. Assess the features and user interface. Ask about use cases, integrations, security and compliance, scalability, ROI tracking, as well as the vendor's product roadmap.

Tools for intent and/or account intelligence

- Bombora
- 6sense
- Demandbase
- G2
- Terminus
- Clearbit

Tools for personalization and landing pages

- Drift
- Qualified
- Navattic
- Mutiny
- Uberflip
- Pathfactory
- Ceros
- Folloze

Tools for sales engagement

- ✔ Outreach
- ✔ Apollo.io
- ✔ Salesloft

[Davis Potter](#), CEO of [ForgeX](#), says...

> 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.

08 Measure your success

Early indicator metrics for ABM

Work with your Operations, Sales, and Customer Success teams to answer questions about accounts that are now clients, including:

Account engagement: How deeply are your target accounts interacting with your marketing efforts? Build a picture using website visits, content downloads, email opens, and event sign-ups.

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 difference in the engagement is significant!

Deal velocity: Track the rate at which contacts from target accounts enter your sales funnel.

Content engagement: Measure how frequently target accounts interact with personalized content and for how long.

MQA creation and conversion: How many MQAs have you created? What is the conversion-to-opportunity rate compared to your previous conversion or MQL conversion rate?

Metrics to focus on

Pipeline velocity: This metric tracks how quickly opportunities move through the sales pipeline. It measures the time it takes for accounts to progress from initial contact to closing the deal. Faster pipeline velocity is generally indicative of an effective ABM strategy.

Deal conversion rate: This metric focuses on 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.

Account expansion: This metric looks at the growth of an account's spending over time. Successful ABM strategies can lead to cross-selling and upselling opportunities within existing accounts, contributing to account expansion.

Account coverage: This metric evaluates the proportion of key stakeholders within a target account who are engaged with your campaigns. It's important to ensure that your ABM efforts are reaching various decision-makers and influencers within an account.

Return on investment (ROI): Ultimately, ROI is a critical metric. It helps you determine whether the resources invested in your ABM strategy are yielding profitable returns. Calculating ROI involves comparing the campaign's costs against the revenue it generates. The same can be done for your supporting tools.

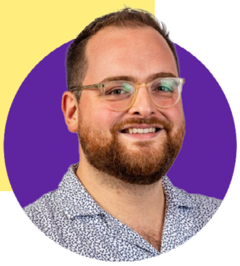
No attribution? No problem

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 are able to 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: Track the level of interaction with net-new accounts through content consumption, website visits, and other activities.

MOFU Conversions: How many MQAs did your campaign contribute to? How many meetings/opportunities?

Pipeline contribution: Assess how net-new accounts contribute to the sales pipeline and revenue growth. Look at the conversions from each stage to closed won.

Late-stage funnel campaign

Close won rate: Evaluate the impact on your close won rate with and without ABM campaigns.

Deal velocity: Same as above, but look at total time to close velocity and compare to averages within your organization.

Deal size or revenue impact: Assess the revenue generated or the impact on the deal size from late-stage funnel accounts. Also look for annual contract value.

Customer campaign

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: Evaluate the number of opportunities, pipeline and AVC for upselling or cross-selling to existing customers.

Customer satisfaction: Conduct surveys and gather feedback to understand how your campaigns have impacted your relationships with customers.

This is a great time to assess your net promoter score (NPS). Start by categorizing your respondents as either promoters (favorable to your brand), detractors (unfavorable to your brand), or passives (no strong feelings towards your brand). Then simply subtract the promoters from the detractors to calculate your NPS.

Advocacy campaign

Advocacy actions: Monitor the number of advocacy actions taken by customers, such as referrals, testimonials, social mentions, or case studies.

Referral opportunities: Track the number of opportunities generated through customer referrals.

Advocacy ROI: Evaluate the return on investment from advocacy-driven revenue and referrals.

How to define...

Cost per opportunity (CPO)

Establish a specific target for the cost associated with generating or influencing sales opportunities within target accounts. Set clear objectives for the number and quality of opportunities to be created while managing campaign costs to achieve a favorable CPO.

Deal velocity

Specify the desired timeframe for moving accounts from initial engagement to closed deals within target accounts. Establish benchmarks for the average time required to progress through sales stages, aiming to accelerate the sales cycle and increase the efficiency of your ABM efforts.

Opportunities

Set specific targets for creating or influencing potential sales opportunities within target accounts. Determine the desired number and quality of opportunities, aligning with revenue objectives, and establish key metrics to measure success in generating sales opportunities through your ABM strategy.

Use your MQA-to-opportunity conversion rate to work backwards and identify how many:

- ✔ Target accounts you need to go after
- ✔ MQAs will be created
- ✔ Opportunities are expected

This will also give you insight into the total campaign cost and can further inform your cost per opportunity metrics.

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 targeted growth strategy.

01

Build your target account list

- Define your ICP
- Work with Sales and Operations to filter your list
- Tier your accounts according to your organizational initiatives/KPIs

Identify your decision makers

- Analyze your last ten to 20 sales deals
- Identify the decision makers involved and their challenges
- Prioritize them based on their level of influence on purchasing decisions

02

Strengthen your relationship with Sales

03

- Set expectations with SLAs
- Arrange regular touchpoints to share updates and insights
- Flag engagement and set up a process for handing off Sales-ready accounts

Select your strategies

04

- Identify where targets accounts are in the sales funnel
- Select your approach (1:1, 1:Few, 1:Many) and choose relevant gifts
- If you attend events, adopt an ABM lens

05

Group your accounts

- Choose your tactics for each account based on its specific attributes

Define your budget

06

- Determine your budget based on your desired CAC, goal alignment, the resources you'll need, and potential ROI.

07

Choose your ABM tools

- Build the foundation before buying and establish order of need and priority
- Experiment with segmented campaigns focused on key areas
- Ensure your strategy is at the right stage of maturity with each tool you take on

08

Measure your success

- 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!

Reachdesk

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G2 Reviews

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