The First Ever Visual Guidebook

to Advanced ABM

ABM LEADERSHIP ALLIANCE, 2021

A Sprinter's Feast

You've crawled. You've walked. Now run. In this first-ever visual guidebook, the ABM Leadership Alliance brings all the advanced ABM strategies that you typically only happen upon by chance into one place where you can peruse, adopt, and practice.

Why a visual guidebook? Because sometimes you have to see to believe. ABM strategies and technologies that grease the funnel in all sorts of fun and unexpected ways can reinforce one another, and their effects can compound. Your direct mail gift can trigger a webinar attendance that generates a flurry of online research across many time zones. This guide's visual spread is intended to help you see how advanced tactics are really clusters of tactics, and together make one powerful, advanced program.

Through this guide, we'll follow the thread of one theoretical buying journey and explore the advanced strategies and software you can use to guide it.

Categories

Data and targeting

Orchestration

Video

Tactile gifts

Advertising

Signature marketing

Personalization

Segmentation

Syndication

Sales engagement

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What is the ABM Leadership Alliance?

The ABM Leadership Alliance is a coalition of the top ABM software providers who've gathered to provide cutting-edge information about what's new and effective in B2B marketing.

Learn more at
https://www.abmleadershipalliance.com/

1. What is Advanced ABM?

Practicing advanced ABM is the act of staying at the forefront of account-based strategies and tactics. That's what advanced means—it's from the Latin root for "front"—and what's at the front is ever-changing. Today's pioneers are tomorrow's laggards if they don't continue to experiment.

A chief characteristic of advanced teams is they're able to combine strategies and channels in new and interesting ways. That's only possible because they've mastered the basics. Their sales team is primed to participate and so they can mix direct mail with digital with virtual events with content syndication in ways that delight. They could have the same budget as their competitor, yet appear to have double the market presence simply by how they wield it.

Advanced teams are also advanced in how deeply they understand their customer. Rather than conduct broad-based advertising and commit random acts of account-based marketing, they send specific messages to specific targets in ways that feel surprising, new, and engaging. For instance, their ad features an ebook the viewer just downloaded. Or their email features a video the recipient was just watching and implores them to finish it.

ABM teams also spend a lot of time talking about what they shouldn't do. Unlike those just finding their feet or justifying their program, ABM marketers in the run phase have a firm sense of what works for their buyers and they're careful to only invest their time and budget where it has an impact.

"An amatuer practices until they get it right. An expert practices until they cannot get it wrong."

- Lao Tzu

2. Areas of Advanced ABM

The following chapters are told through one long buyer journey of the fictitious firm Goodly. It's a composite of several real firms and a cycle that's common in ABM: Lengthy, non-linear, and complex.

Each callout explains a particular advanced strategy you can use at that point. These strategies are often paired with a technology from a member of the ABM Leadership Alliance. While many of the strategies can be pulled off with what you already have around you, some are difficult to act on without, say, a way to programmatically mail gift boxes or encode videos. For more on building an ABM tech stack, visit the ABM Leadership Alliance website.

goodly

Let’s follow the buying journey of our fictious firm Goodly

At the start of this guide, we find our fictional firm Goodly in the earliest phases of its buying journey. Its committee hasn’t begun to talk just yet. Several stakeholders are only vaguely aware of a solution to the problem they’re experiencing, though the firm exhibits all the right characteristics.

When they are ready to buy, all your competitors will know and pounce. How do you start the conversation first?

1. Targeting

How you start is how you finish. Targeting errors can compound into weeks and months of lost time spent chasing companies that were never going to buy. There are three approaches to building a clean target account list that captures just the Goodlys:

- **Profile your ideal customer:** Look at the characteristics of your ideal current accounts. Work up a list of shared characteristics like headcount, revenue, tech stack, etc.
- **Use a predictive model:** Hire a provider or build your own model to analyze your customer base and deal history to draw out characteristics.
- **Profile based on behaviors:** Rather than look at characteristics, look at actions. What did your ideal current customers do on your sites (first-party) or those of others (third-party) prior to purchase?

Use one or several of these methods to reduce a database of your entire market down to a list of target accounts. Give the list a catchy internal name, like “Ideal Customer 4,000,” or “IC4k” for short, so people can talk about it.

35%

of marketers suffer from inaccurate targeting.

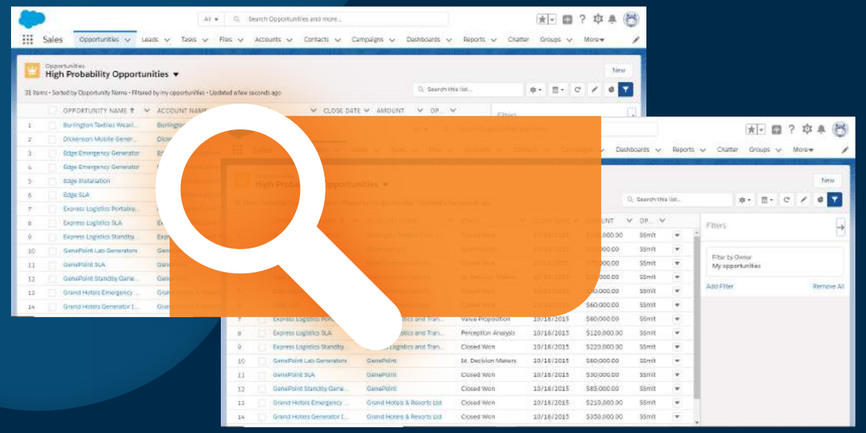
- Forrester

Combine 3-5 data sources for account intelligence

If you use too few data sources, you experience coverage gaps and miss accounts. You could miss an ideal company because its revenue is split between several orphan subsidiaries. Multiple sources help you increase the odds you'll catch good accounts.

Your options:

- Know how accounts have engaged with your online properties or past sales and marketing with **engagement data** (Demandbase, LeanData)
- Know when accounts are searching for you on sites you don't own with **intent data** (Demandbase)
- Reach beyond your own content to gather buyer-level intent insights from prospects in your target accounts who are actively researching with syndication and **first-party sourced account data** (NetLine)
- Match leads to accounts, dedupe accounts, and match entities to subentities with a **matching service** (LeanData)
- Know which product or package someone is interested in and how educated they are with **content consumption data** (PathFactory)
- Understand areas of key buyer interest by looking at behavior on high intent content with **video view data** (Vidyard)
- See who's attended your events in the past with **attendee data** (Bizzabo)
- Cross-reference lists with partners going after similar accounts.



In tough times, partners can help you more easily expand. You can make a Venn Diagram and see where your lists overlap, coordinate, and run joint plays.

- Christine Farrier, Demandbase

Operationalize your intelligence with a dual account score

Build a dual scoring model for your accounts—a single score that's a composite of two sub-scores—one for account fit and one for account intent. This way, you can prioritize companies that are both good fits *and* in the market to buy, and can re-prioritize if one of those factors changes.

- **Account fit:** Does this account fit our firmographic requirements?
- **Account intent:** Is this account actively researching us?

You might also layer in:

- **Relationships:** Executive connections, board crossover
- **Engagement:** How are they researching on your owned sites?

Together, these four data types create an acronym known as "FIRE."

Use an ABM platform like **Demandbase One** to access all four types of FIRE data. The platform also provides a foundation upon which to build your entire ABM strategy.

Let sales participate

Give sales teams the ability to add or disqualify accounts on the TAL through the CRM, but audit the list. E.g. enterprise teams can add up to 15 accounts and mid-market teams can add up to 30.

Manage your data

Segmenting your list doesn't work if you aren't connecting parent accounts to child accounts. Same with channel allocation if you aren't attributing touches and relative influence. As much as possible, you want to create passive processes (required fields, bidirectional syncs, periodic transformation, or cleansing) that keep your data accurate.

A data partner like **LeanData** can give you more control over your data. It uses what's called a fuzzy-matching algorithm that unites accounts like "Goodly" and "Goodly, Inc." It also automatically attributes revenue to the right campaigns.

2. Sales engagement

Goodly's intent and engagement scores are rising. The team there is reading syndicated articles and watching videos on your site. It's time to run sales plays.

Send tactile marketing

Keep physical branding experiences simple by creating a direct mail value matrix, pictured. It tells salespeople what they can send to whom. Don't just send swag: Personalize the messaging and contents to a conversation or publicly discoverable fact, or use it to reinforce another campaign.

Use tactile marketing to reinforce other campaigns:

- Send popcorn to ensure webinar attendance
- Send a 4k webcam before they give their keynote
- Accelerate contract signing by sending a high-class pen
- Send customers a bottle of champagne to announce a new product

Give reps access to a tactile marketing vendor like **PFL**, which enables them to personalize, send, track, and call the moment they get a delivery confirmation.

Sample tactical marketing matrix

	Prospect	Opportunity	Engaged
Executive	N/A, engage after decision-makers	Medium-value item and messaging to hit hard on pain points	Relevant case study and a high-value item
Decision-maker	Low-cost flat mailer with a small item and value proposition	Medium-value item and a product guide or competitor comparison sheet	Meeting-maker kit with a medium-value item
Champion	Low-cost flat mailer with a small item and list of industry tips	Medium-value branded item and content targeted to the interests	Item personalized with champion's name and message of appreciation

This table is a sample matrix. Customize yours to your audience and personas.

Use a proven sales cadence

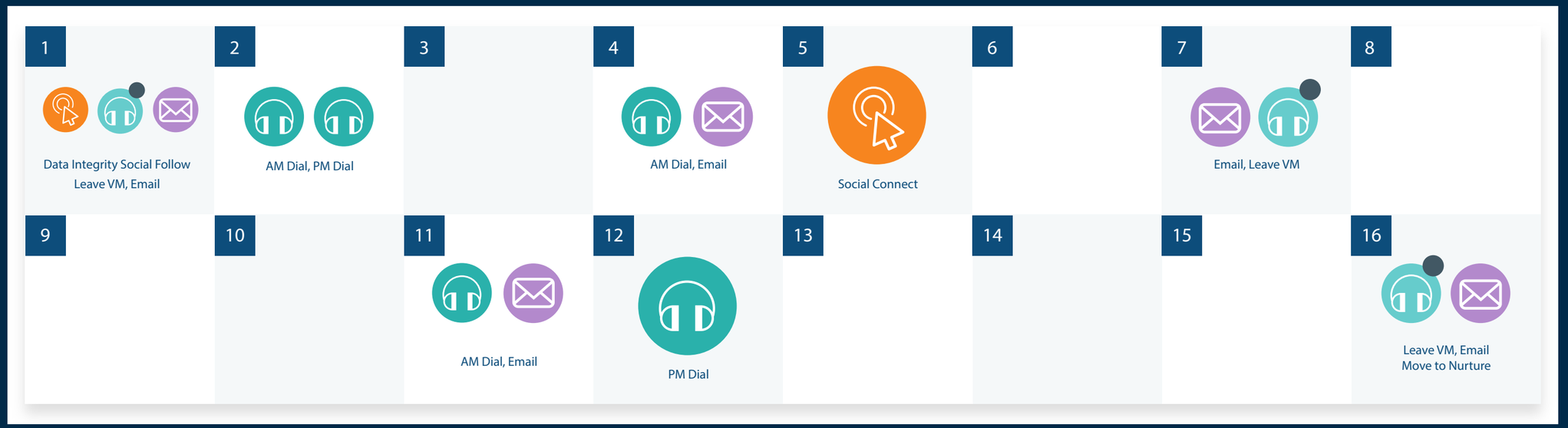
On the first day of engagement with a new account, execute a burst of sales steps aka a 'triple touch': a phone call, an email with a personal video, and a LinkedIn message. Be sure to start with the phone call. Eighty percent of the top 100 cadences SalesLoft reviewed (out of a sample of 3.4 million) started with a call followed by an email.

Pro tips:

- Prep your sellers with vertical or role-specific templates, videos, and assets.
- Have sellers send the email themselves so they can omit the "opt-out" link.
- Keep subject lines short: 1-4 words, no numbers, and do mention your company.
- If you were referred, say so in the subject—it increases reply rates 536%.
- Use the 10-80-10 rule: Personalize the first and last 10% of the email.
- 'Hey' is still the optimal greeting with reply rates 11% above average. The optimal closing is 'Talk soon' with a 107% higher reply rate.

Use a sales engagement platform like **SalesLoft** to coordinate plays, share templates, and track it all.

See SalesLoft's own SalesLoft sequence:



Send personal sales videos

For first impressions, video beats text. People would rather watch than read. Hold up something recognizable in the video thumbnail—one of their products, their name written on a whiteboard, or a screen share of their LinkedIn profile.

- **Save yourself time:** Record a personalized introduction and tack it onto a larger video asset. This way it feels personal.
- **Explain why something is relevant:** Record a personalized introduction to a non-video asset like an ebook, and explain what they'll find inside.
- **Increase conversions:** Always end videos with an account-specific, relevant CTA to read an asset, book a meeting, or take a next step.
- **Make booking meetings easier:** Insert a "Book a meeting" button that links directly to the rep's calendar.

Use a video platform like **Vidyard** to make video creation and sharing easy enough for salespeople to work it into every cadence. It'll provide valuable view data on the back end and help personalize existing marketing content at scale by allowing sales reps to record custom intros to relevant content.

Emails that contain a video are 9x more likely to be opened.

- Vidyard

Hold virtual executive networking events

While the world is still grappling with what a virtual or “hybrid” event is supposed to look like, it’s clear that a major draw for in-person executive dinners was the networking. People want to meet others in their industry.

Use a virtual experiences platform like **Bizzabo** to not only allow prospects to meet each other, but also capture the data on who attended, what they engaged with, and what it says about their interests.

3. Segmentation and personalization

Our fictional firm Goodly is clearly looking for a solution. But how do you ensure they're finding yours? Help them understand with personalized messages. There are three requirements for advanced segmentation:

- **Accurate segmentation:** Divide or tag your list by role, interest, sign-up date, campaign, etc.
- **Relevant messaging:** Alter your messaging to fit each segment.
- **Distribution:** Run campaigns that match messages to segments.

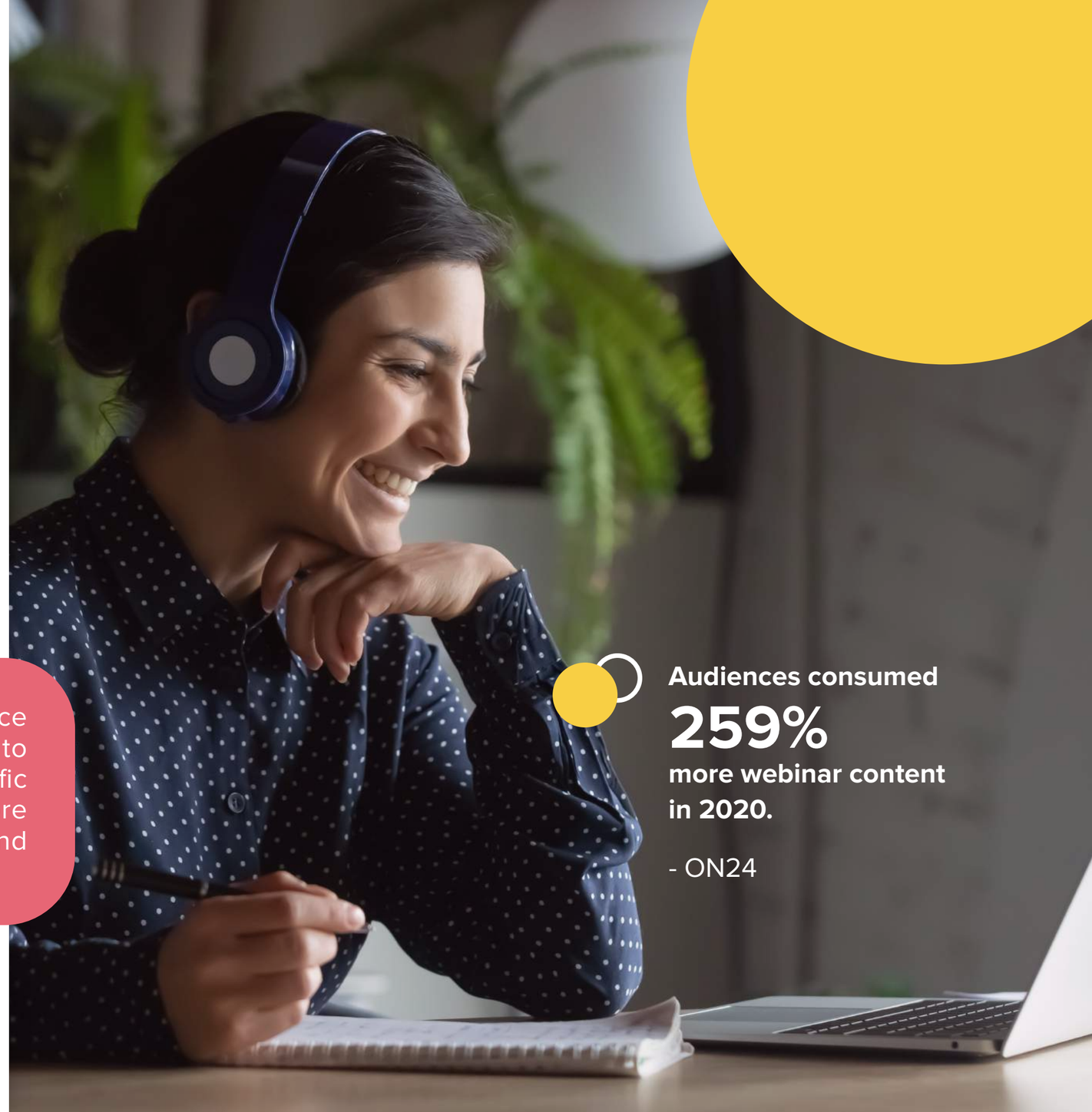
65%

of personalization plans fail for a lack of data, content, or delivery tools.

Create a webinar specific to one account

If you have an internal champion, have them co-host a webinar for their own company. They can validate its importance, draw attendees, and tailor the message. This is especially effective for land-and-expand accounts where your champion can show their colleagues how they use your service.

Use a digital experience platform like **ON24** to capture viewer-specific interest data for more accurate scoring and campaigns.



Audiences consumed

259%

more webinar content in 2020.

- ON24

With a sales engagement platform like **SalesLoft**, you can manage your team's sequences and funnel valuable data back into your marketing program.

Create persona-specific email outreach tracks

Build an ideal email sequence, then copy and customize it for the four most common personas: executive, sponsor, end-user, etc. Include videos that use mid-roll gates to progressively profile prospects, asking for information like whether they're actively buying, or whether they're a budget holder.

Create segmented content “tracks”

Don’t make the mistake of dumping all your ebooks, videos, and infographics into an unsorted resources section on your website. Prospects aren’t going to figure it out. Instead, create customized, persona-specific content packages where they can find, read, or watch exactly what they need.

Use skip-logic to prevent people from seeing the same content twice, and modulate the speed of the nurture based on buyer interest. For example, have a slow lane (1 email per 3 weeks), medium lane (1 email per week), fast lane (2 emails per week).

A tool like **PathFactory** can help you group your content into segment-specific tracks to keep people reading or watching—it’s like a YouTube channel for your content.

4. Advertising and content

Our fictional firm Goodly is on the brink of evaluating. It's a big account. You haven't identified every potential stakeholder, and some of those who've engaged have surprising titles. How do you reach everyone to keep them learning about your solution?

For one, advertising. Advertising works in ABM—but only with technology that recognizes accounts, not just individuals. Pair it with content and syndication for greater reach and to collect data that can improve your targeting.

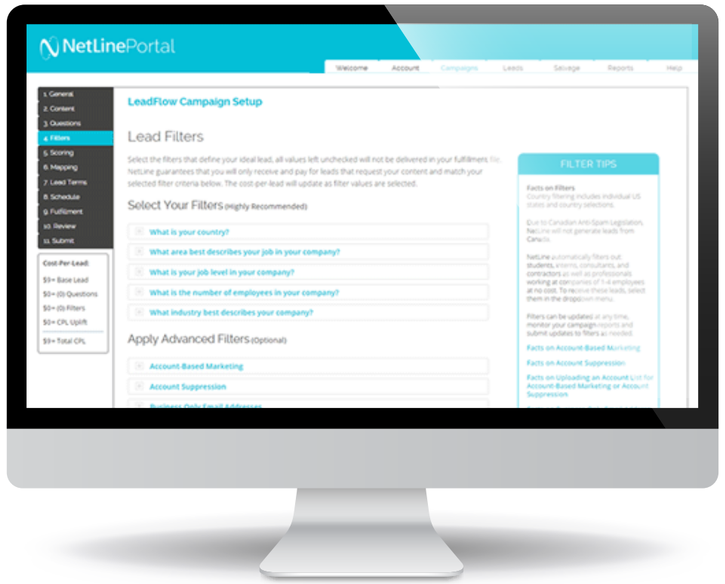
Run integrated ABM ads

It's important to use a B2B-focused advertising platform. Consumer advertising platforms like Google and Facebook (often) don't know people's job titles, seniority, or factors important to your advertising. That hurts your relevance score, makes ads cost more, and is inefficient. Injecting B2B lookalike segments into a consumer ad platform is better, but still has the same issues. What you need is a B2B-specific ad platform.

Demandbase offers the only B2B-specific ad platform. Its DSP measures on lift, intent, engagement, account-level IP addresses to reach people on the buying committee.

Run buyer-level syndication programs

Find a B2B-specific syndication partner with access to a network of publishers to promote your ebooks, white papers, webinars, and more. Because it's B2B specific and professionals are often researching technical challenges, you can trust you're reaching the right individuals. Depending on how advanced the syndication technology is, you can also gain insight into in-market accounts that weren't originally on your target list but are looking for a solution like yours.

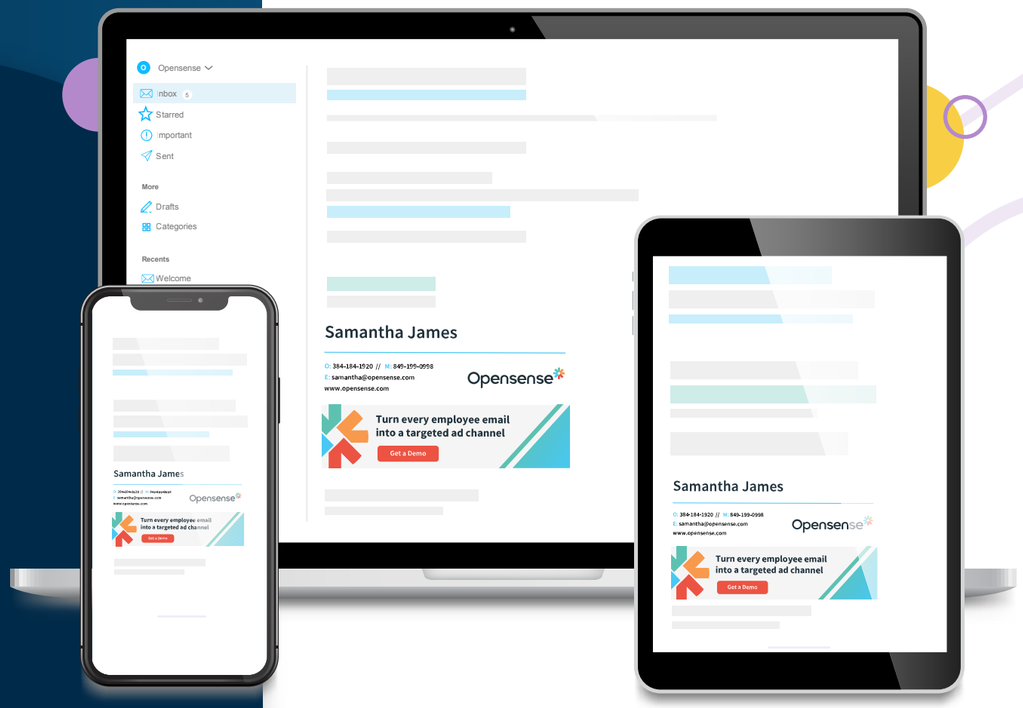


Use **NetLine's** syndication platform, the largest consolidation of business content on the web, to reach target audiences that specifically meet your unique criteria.

This often reveals hidden buyers or influencers. In one instance, a **NetLine** customer identified 40 people within a large firm who read their white paper, giving sales the intelligence they needed to act.

Run ads in your email signatures

Email signatures are unused real estate. Coordinate signatures across your organization to advertise events. With an email signature marketing software, you can serve up different signatures based on the recipient's persona or account.



Use **OpenSense** to control your organization's email signatures and effectively turn it into an integrated marketing channel.

Use video marketing to supercharge your channels

Video is exciting, unusual, and increases conversions. Use it for a boost in emails, on landing pages, or within the product. Use a video platform to simplify hosting and sharing, and for marketing specific features like:

- **Post-roll gating:** Ask viewers to fill out a form part-way through.
- **Calls to action:** Insert links and buttons to drive your buyer to the next step.
- **Analytics:** Understand how your videos are viewed to understand your buyers' interests.

Use **Vidyard** to automatically personalize videos to the vertical, account, or even person. Its video marketing technology lets you insert personalized images and text automatically. Sales reps can also easily personalize marketing assets by introducing the asset with a quick video on why they think it's relevant to that individual or account.

Classic content marketing

Content powers all else, but resist the urge and internal pressure to publish for the sake of publishing. Instead, use content to eliminate friction in the buyer journey. Publish an internal style guide and rubric for content quality. For example, “Is this unique? Is it so good readers would pay for it?”

Think deeply about how your content operations are structured. Is it top-heavy? Are there too many cooks? Experiment with removing executive approvals (with their permission). Does the content turn out better and take less time?

To keep quality high:

- **Interview customers and prospects often.** Ask them to explain your solution in their own words. Listen.
- **Manage a content backlog.** Add new ideas, rank them, create the best, and periodically delete the rest. If it’s a good idea, it’ll come back.
- **Reduce, reuse, recycle.** Consistently recycle and update your highest-performing content.

Use **PathFactory** to organize your content into “tracks” and let its recommendation algorithm serve up what each visitor is looking for.

5. Orchestration and sales enablement

The fictional firm Goodly team is now evaluating in earnest but some things aren't clicking. Some team members aren't making the connection between their needs and the solution, and a few people are acting as detractors and saboteurs. Connect your salespeople with those buyers to demystify your product and move things forward.

Orchestrate the marketing to sales hand-off with lead-to-account matching and routing

Once buyers reach a certain level of engagement with marketing content, it is important to connect them with the right seller who understands the account's history. Without proper matching and routing, several buyers from across the account could be researching simultaneously and the appropriate salesperson wouldn't know. Or worse, multiple sellers could be bombarding the same buyers with outreach.

"Lead-to-account matching and routing solutions have become integral to the tech stacks of the highest-performing sales and marketing organizations."

- TOPO

Use **LeanData** for automatic, intelligent matching and routing.

Orchestrate all your activity through one platform

You can’t practice advanced ABM without an orchestration platform that coordinates sales and marketing plays across channels from one interface. A platform also provides the reporting, dashboards, and analytics necessary to measure what’s working and what isn’t.

Use **Demandbas One** to coordinate cross-company plays, as well as cross-partner plays. It’s sales, marketing, and advertising in one.

Hold regular account meetings

What gets measured gets managed. Set recurring meetings to meet and discuss top accounts.

Promote account-specific events and content via email signatures

Email signatures are unused real estate. But don't just coordinate the signatures across your entire company—personalize what appears in that signature based on the recipient. For instance, an account-specific webinar tailored to that account.

Use **OpenSense** to turn your company's email signatures into a marketing channel.

Create content hubs that use an algorithm to recommend assets

Do as Netflix does and rely on an algorithm to surface the content you create to the right viewers based on their role and behavior.

Vidyard Video Hubs allow you to group your many videos into “hubs” of related content, and the algorithm will serve up more and more enticing videos. This in turn generates useful viewing data.

Use **PathFactory** to create content tracks and recommend relevant content.

6. Managing deals—full lifecycle

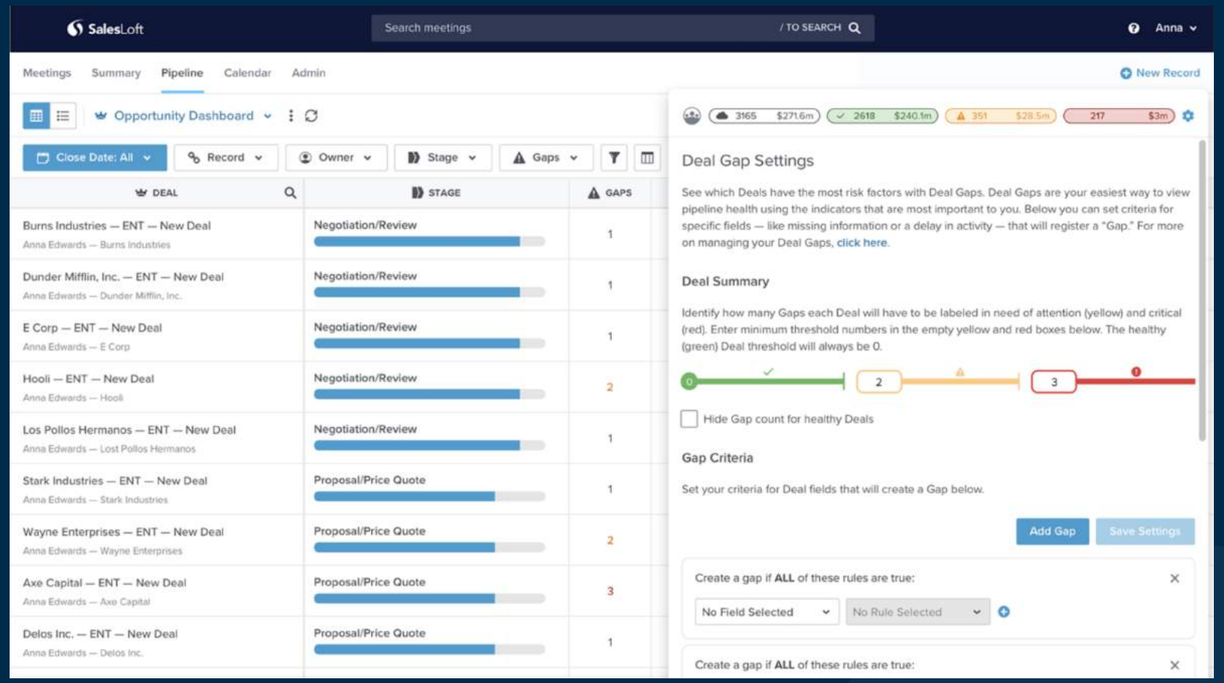
Yesterday an opportunity was opened for our fictional account, Goodly. Now the sales cycle is on, and it's an evaluation against your top three competitors. How will you guide the buying committee into your court?

Shorten cycles with selling insights

With a sales engagement platform, salespeople and marketers get one view of activities and outcomes and can see how deals are progressing—which are winnable, and which need more attention.

With **SalesLoft**, you get deal insights that highlight risk factors or “Deal Gaps” like too few contacts or a delay in activity. You can also improve campaign performance:

- See how the team is performing
- See which cadences lead to revenue
- See what specific steps create opportunities
- Identify keywords within sales meeting recordings—things like competitors or winning phrases



Vidyard makes recording as simple as one click within your browser. Try it free.

Tap in experts with asynchronous video

Speed up deal cycles by having sales engineers, business managers, and support teams record videos to answer questions when they have time. It can save you from scheduling another meeting.

Implement service level agreements (SLAs) for speed-to-lead

Establish an SLA for the time between when a lead is created and when it receives outreach. Say, two hours. Make someone in sales and someone in marketing mutually responsible for it.

Use **LeanData** to route leads appropriately based on where they are in their journey.

Use account-based webinars for research

What's unique about webinars is that unlike ebooks, you don't just create them and toss them out into the world. At the end, you get to hold a Q&A where prospects ask their questions. This teaches you what they really need, and your entire team can be present to take notes.

EBOOK

Research

Write/Design

Hope it answered the question

WEBINAR

Research

Write/Produce

Present

Answer questions/concerns

+ Sell

+ Build relationship

+ Learn about the account

+ Improve future content

7. Virtual events

Our fictional account Goodly is interested, but are they convinced? Give them the courtside experience—the thought leadership, the customer summit, the invite-only networking sessions, and the personal video thank you's that drive it all home.

Send personal, account-level invites and follow up videos

In the video, a salesperson (or better yet, the event speaker) can explain why it's relevant and offer additional relevant content for the account to engage with.

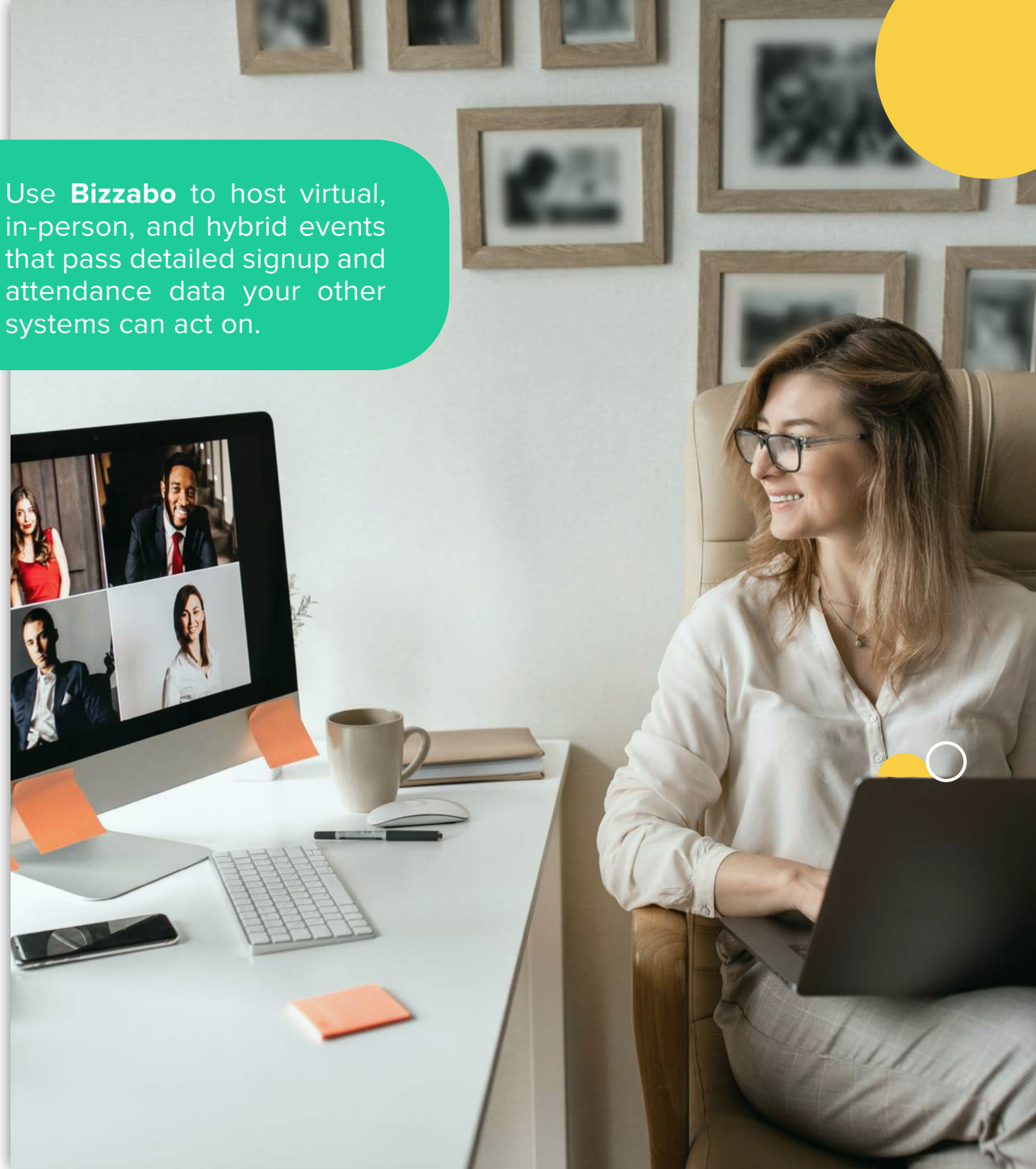
Run topic and account-based webinars

Send treats like popcorn to encourage attendance

Have salespeople, marketers, or speakers send personal “thank you” videos

Cement the interaction with a delightful thank you that ends in a call to action.

Use **Bizzabo** to host virtual, in-person, and hybrid events that pass detailed signup and attendance data your other systems can act on.



Run one-to-few events like roundtables and happy hours

These make good sweeteners and add-ons to larger events, and allow for personalization and the greatest value—connecting practitioners with other practitioners which can lead to partnerships and job opportunities.

Host summits and user conferences

Large events give prospects a bit of reprieve from work while also showing off all the myriad ways to use your service (and others like it).

Use **ON24** to produce live and pre-recorded summits, and to give old video content new life.

Participate in others' events

Key questions to ask: How much data will you get on attendees? Will the event host provide names and contact information? If you get a digital booth, what are historical engagement rates within those booths?

8. Closing deals and account growth

The verdict is in and ... Goodly is going with a competitor? Yes, really. The other sales rep threw in an extra product line for free and Goodly's CFO stepped in and made the call. But your sales rep isn't buying it. She begs for 15 minutes and, on a Friday, as everyone's about to depart the office, she convinces that CFO that they'd only be getting what they paid for.

To everyone's surprise, sales ops has to stay late because this deal is flipped to Closed-Won. The question now is, what are you going to do with all that valuable deal data?

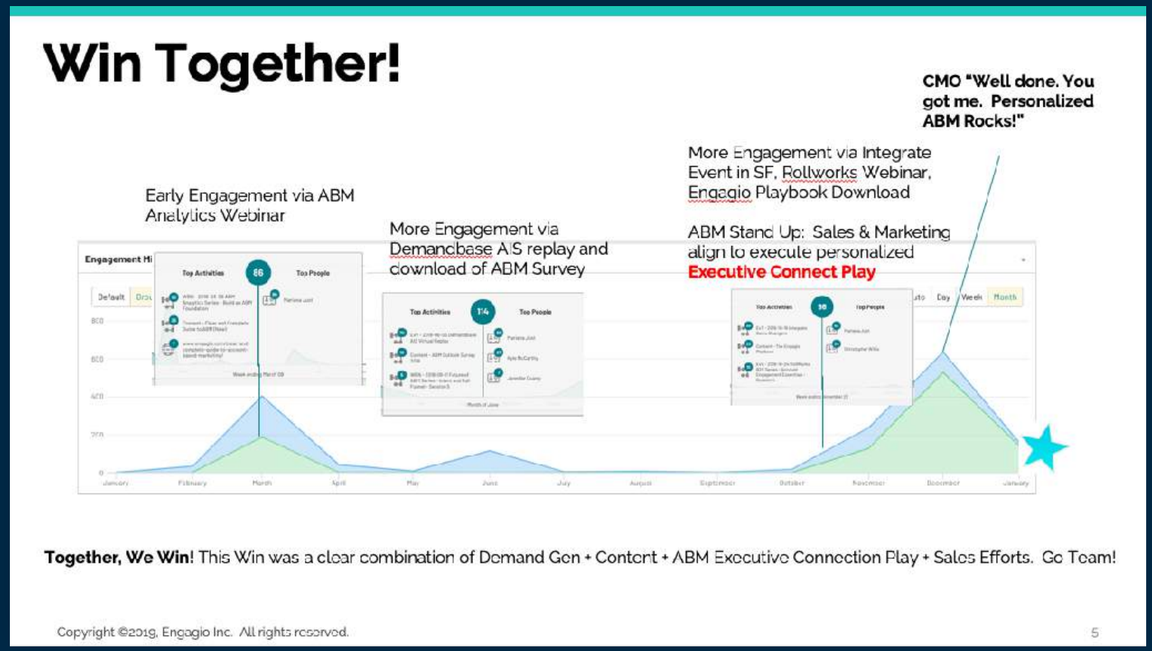
Hold a post-mortem

After the celebration, analyze what went well. Use data from your ABM platform to understand how this deal compares to others. Did it take longer to close? Were there more stakeholders? What stages were longer, and what can you do to reduce them?

Use **Demandbase One** to analyze won or lost deals, extract insights, and attribute successes to the appropriate programs and touches.

Create account success decks

Communicate your wins to keep up morale and give reps new ideas.



9. Scaling your program

Goodly is Closed-Won. Others are as well. But now you've got a new challenge—your ABM program has gone from scraping for budget to drowning in it. How do you scale your program?

Reinvest in measurement

Refine your attribution. First-touch and last-touch are tantamount to marketing malpractice when it's time to scale the program, as they don't tell you how deals are actually won.

LeanData provides automatic, accurate, campaign-level attribution for all your campaigns.

Expand your target account list with data tools

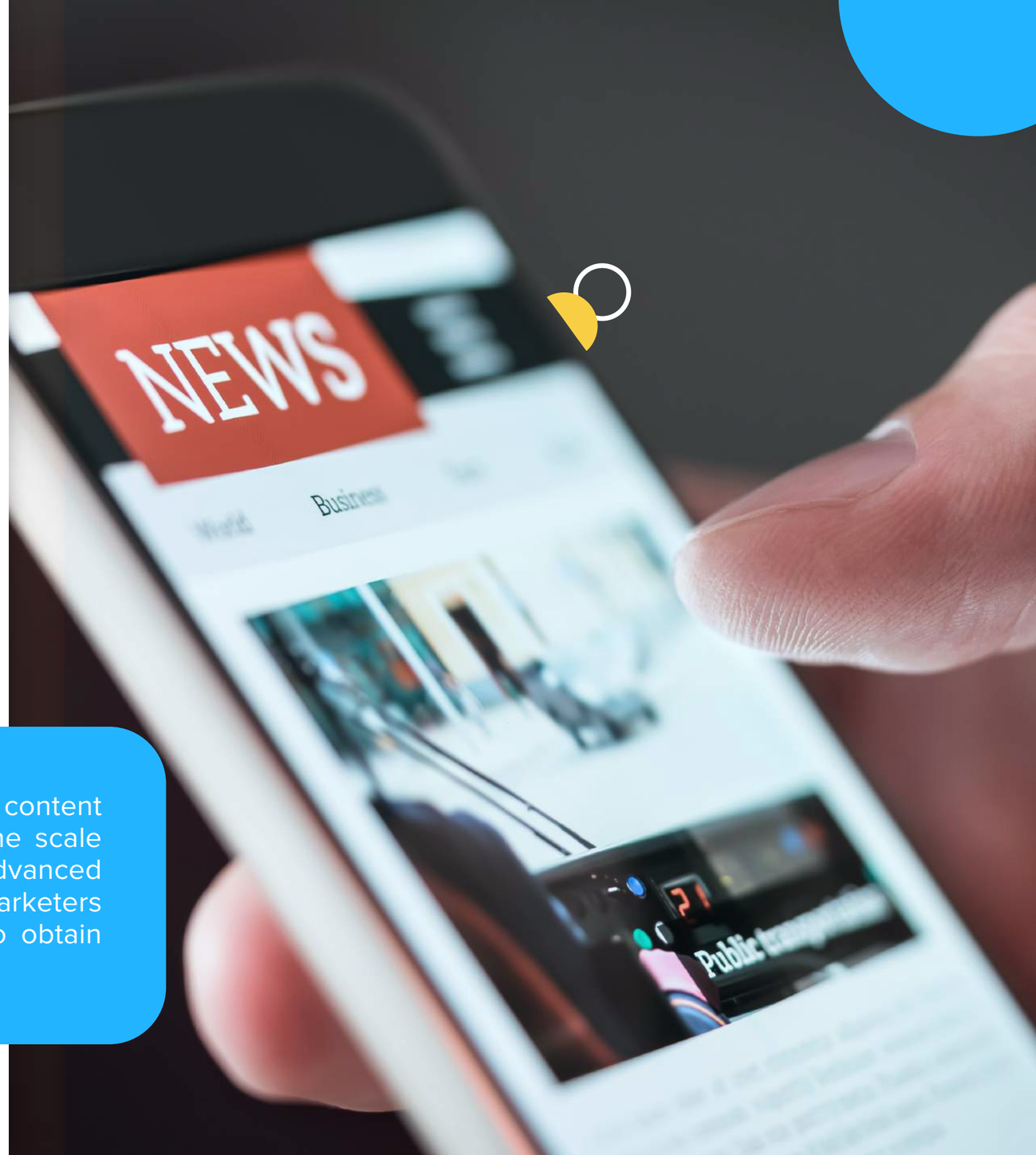
Use a mixture of fit, intent, relationship, and engagement (FIRE) data to expand your list from IC4k to, say, IC15k.

Use **Demandbase One** to analyze won or lost deals, extract insights, and attribute successes to the appropriate programs and touches.

Meet your buyers where they are and reach beyond your content

To build relationships with in-market accounts, you'll need to increase lead quality and volume further. For that, B2B-specific syndication partners can help you reach beyond your list into new ecosystems.

NetLine powers the largest B2B content syndication platform, providing the scale required to be successful. Their advanced Intent Discovery solution allows marketers to reach beyond their content to obtain first-party sourced intent-rich data.



Track your sales process score

In your sales engagement tool, create what's called a "sales process score" to measure how reps are abiding by their tasks and sequences. Do they call when expected? Respond within a reasonable time? What can you learn and how can you improve your program?

Examples of reports you can pull:

- All activities per user
- All emails per user
- Leads and contacts with 'steps due today' per user
- Day one steps completed by user today
- Leads and contacts with 'overdue steps due' per user
- Active and neglected leads, contacts, accounts, and opportunities per user
- Active account penetration

Being advanced means staying advanced

You may have won the Goodly deal, but the real test is how you use what you've learned to fortify your program. Being advanced means staying advanced through constant experimentation, and you're now armed with dozens of plays with millions of possible combinations. It's your turn to show us—what does advanced ABM look like?

Tell us about your successes—tweet the ABMLA at @ABMLA1.

Follow the ABM Leadership Alliance

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