GANGBUSTRS

The
BUSY EXECS
Guide to
ACCOUNT-BASED
MARKETING

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CONTENTS

PLANNING + STRATEGY

INVOLVING THE RIGHT TEAMS FROM THE START IS CRITICAL.

You must become the company's ABM champion.

A strong ABM program begins with a simple plan but requires a lot of collaboration to properly execute. Success will never materialize if you don't make sure you involve the right teams from the start. You are going to need to become the company's ABM champion.

ABM is a fluid program made up of many campaigns with different purposes. Some drive awareness, some are full-funnel nurture campaigns, and some induce bottom-of-funnel activity for sales. Over time you will create a network of interactions that make up the customer journey.

Let's get started!

STEP 1
Executive Team Alignment

ABM is a team game. To create a list everyone loves, all stakeholders must be involved in making plays.

As you begin, remember that ABM is a team sport. It's hard to truly understand your current strengths and weaknesses from the customer's perspective until you talk with all the right people. Their input will guide a unified strategy across sales and marketing on the same accounts. To get all stakeholders to "love the list," everyone must have a role in its creation.

Hold discovery sessions with stakeholders on the executive team and in marketing, sales, and IT to align on objectives and timelines. Give them an overview of how the Target Account List (TAL) was selected, key Ideal Customer Profile (ICP) insights, and other relevant topics and ask for input.

THE FOUR CONVERSATIONS YOU MUST HAVE

Executive team:
Align on business outcomes

Align on goals, KPIs and targeting, get sales team aligned.

Marketing team:
Gather baseline content

Gather baseline content available, ICPs, and target accounts.

Data/IT team:
Decide on whether you have the right tools

Ensure all appropriate systems are linked, for example, Salesforce and your ABM platform, to take advantage of predictive intelligence capabilities.

Sales team:
Develop ICP and TAL with sales

Compile and analyze ICP information and guidance and introduce new research that is based on talking with client sales teams, assessing industry standard job roles, and leveraging existing industry expertise whenever relevant. Revise and/or create Target Account List.

Evaluate Your Tools

THERE ARE A TON OF TECHNOLOGIES THAT CAN AUTOMATE ABM. WHAT YOU CHOOSE COMES DOWN TO EFFICIENCY AND EFFECTIVENESS.

Executing the most basic marketing strategies today is becoming more complex as customers get harder to reach, content consumption fragments, and devices proliferate. Because of this, automation is a key component of ABM. The good news is that there are a lot of technologies that may help. The bad news is that there are a lot of technologies that may help.

We'll make it easy.
Every tech question boils down to two criteria:

1

EFFICIENCY

Look at features, functionality, integrations, and predictive capability. Whatever the advantage, tech should help your ABM teams work more efficiently through automation.

2

EFFECTIVENESS

The same thinking holds here. Effective tech should be able to produce measurable performance enhancements through unique data, ad inventory, or, of course, the catch-all, artificial intelligence.

SALES ENABLEMENT

Insights
Share buying signals with sales

Contact Development
Enrich contacts with lead-to-account matching

Sales Intelligence
Align sales and marketing around data

MEASUREMENT

Analytics
Measure the impact of campaigns

Attribution and Reporting
Align KPIs and prove marketing ROI

Business Intelligence
Refine strategy with multiple data sources

Testing and Optimization
Improve engagement and alignment

ENGAGEMENT

Advertising
Communicate directly with the buying committee

Live Chat
Accelerate engagement and conversion

Content
Empower prospects with information

Direct Mail and Email
Deliver highly personalized messaging

Events
Meet target accounts on their turf

Social
Build awareness, trust, and relationships

SMS
Share important information and reminders

Syndication
Amplify messaging on trusted sites

Website
Funnel engagement from all channels

TARGET ACCOUNT OPTIMIZATION

Data and Analytics
Make informed decisions about target accounts

Predictive/AI
Evaluate key attributes of high-value customers

CORE INFRASTRUCTURE

Customer Relationship Management
Identify and monitor opportunities

Data Management Platform
Integrate data across solutions

Marketing Automation Platform
Automate and scale communications

Content Management System
Create, organize, and manage content

Tag Management
Manage advertising, testing, and tracking

Orchestration Platform
Coordinate multiple platforms

END USER

Intent Analysis

PEOPLE INTEND TO DO A LOT OF THINGS. INTENT ANALYSIS HELPS YOU PRIORITIZE THE ONES WHO MIGHT ACTUALLY FOLLOW THROUGH.

What is an intent signal and what is intent analysis? Intent signals are any measure of digital activity that you think might signal that a target is in the mood to buy. The challenge is understanding why. Make sure to include sales, share your insights, and gather their feedback. This should be followed up with additional research to look at behavior patterns and content consumption on your site(s). Search is also a wealth of data to support this, but be careful: the behavior of searching does not always imply intent.

From this intent analysis research, your ABM team may recommend additional accounts to target. These accounts are generally identified by having a particular challenge that requires a solution your company can provide. That makes them a desirable target, even if the account may not fit the original TAL. This insight will also be used for determining account prioritization within the existing Target Account List. Let's win where we can win easy first, and get better over time.

Account Data Analysis

THE ONLY CONSTANT IS CHANGE.

If you're not regularly evaluating and updating your account analysis, you're doing it wrong.

To truly leverage the power of account-level traffic analysis plus account intent signals plus content consumption insights for smarter media and better ABM, there needs to be a structured process. Without a process, it is difficult to gather and map the data to discover correlation and causation. Many companies get trapped trying to report on these different data sources. But there is the major difference between reporting and analytics. Account reporting will just cite traffic details, keywords, and content, and it's manual. But you have to know what it means – and it should be automated. This is where more advanced analytics come into play.

This account data will be analyzed to drive segmentation development for media activation. Typical segmentation could include industry segmentation, buying persona segmentation, and/or need state segmentation (based on intent topics) – all of which will inform media channel messaging and content alignment. Such analysis may assist in the continual refinement of Ideal Customer Profiles. Regularly evaluate and update standards and processes around account evaluation and targeting. The only constant here is change.

YOUR GOAL

Get smarter through a structured data collection process and advanced account-level analytics to drive your decision making.

Ideal Customer Profile Development

THE ONLY THING THAT MAKES DISCOVERING YOUR ICP DIFFICULT IS THAT IT'S WAY EASIER THAN EVERYONE THINKS.

What if we told you that you can choose exactly who you want to work with? Businesses with a strong Ideal Customer Profile have a 68% higher win rate than those without them. Choose your customers before they choose you!

To identify the most relevant targets, leverage existing customer data, market analysis, business goals, and other useful information to develop a list of ideal customers with common business challenges you can solve. So how do you do that?

First of all, let's define what an ICP is. An ICP is not a buyer persona. We'll get into that later. An ICP is a list of characteristics that make up your ideal customer. Your ideal customer is very specific to the situation you're trying to solve for, your goals, and your capabilities. You can have different ICPs for different situations, so don't feel boxed in. Apple is known for its incredible B2C marketing campaigns, but we bet you didn't know they also have four main B2B ICPs: education, government, SME, and enterprise. Each of these verticals speaks a different language and requires a different approach.

Let's start building. How much do you know about your existing customers? We're consistently surprised by how little information some companies have. Make a list of the very best clients you have ever had. Collect historical performance data from the CMS, CRM, marketing automation, and web analytics systems in order to better understand successful outcomes and the factors that lead to sales and long-term value (LTV).

Interview your leadership, marketing, and sales teams to get their opinions and insights into which customers have been the most successful using your product or service and which customers are the most profitable and provide the most LTV. Fill out the table below for each customer.

ICP DEVELOPMENT INTERVIEW	
Organization name:	
Company size by employee:	
Industry:	
Budget to pay for solution:	
Actively looking for a solution when they first started working with you?	
Easy to work with?	

Your ICP should look something like this:

READY	Urgency Actively looking for a solution	They're ready to solve the problem and are actively looking for a solution
WILLING	Severity and Frequency Experiencing severe and frequent pain	They have a problem, and they *know* they have a problem
ABLE	Fit Has the budget to pay for a solution	They have the money and the authority to solve the problem

Just as important as understanding what characteristics make up a great ideal customer, it's also important to jot down those characteristics that make up a less than ideal customer! Your ICP isn't just about putting asses in the seats – it's about putting the right asses in the seats.

The end result is an agreed-upon set of criteria that defines your ICP and prioritizes customers based on their potential for LTV.

What does that look like? Glad you asked!

First, your sales checklist. It should highlight all of the characteristics your team agreed on that are important to the success of your organization, and more importantly, to the success of your prospects.

Your list can look like this:

CATEGORY	CHARACTERISTICS
Target Market	B2B; sells to enterprise-sized customers; sells across specific industries and sales territories; marketing/sales departments
Marketing Strategy	ABM; targeted paid media campaigns to A+B accounts; demand-gen inbound campaigns to A+B accounts
Annual Revenue Size	$50 million to $2 billion
Geography	CA, Las Vegas, Phoenix, NE
Verticals	B2B IT/tech, B2B SaaS, B2B manufacturing, B2B tech targeting healthcare, B2B fintech
Attributes	Uses Salesforce or another CRM platform; early adopter of ABM
Routes to Market	Mostly direct but some accounts will have partnership or reseller opportunities
Marketing Ecosystem	Mostly enterprise (long sales cycle, lead based) but in some cases, especially SaaS, transactional as well

To map out prioritization, take each of your verticals and rank them on a scale of 1 to 3 (1 being the highest) for the following criteria. It will look something like this.

CRITERIA	SAAS	MANUFACTURING	FINTECH
Urgency: How badly does this customer need your services right now? How much pain are they in?	1	3	2

CRITERIA	SAAS	MANUFACTURING	FINTECH
Resources: Do they have the resources (money, time, energy) to invest in your services at this time?	1	3	3
Acquisition efficiency: Is it cost effective to get in front of decision makers at this company?	2	1	3
Growth potential: Are there cross-sell and upsell opportunities?	1	3	3
Lifetime value: How long will they use your product? Will they refer other high-value accounts?	2	2	1

ADD UP EACH COLUMN AND NOW YOU NOT ONLY HAVE AN ICP, YOU HAVE PRIORITIES.

BEFORE YOU APPROVE YOUR ICP, RUN ONE MORE TEST!

- Would they know they're your ideal customer if they looked at your site?
- Would they feel comfortable in your app?
- Would they feel like your service was designed for them?

Resources on developing ICP:

https://sixteenventures.com/ideal-customer-profile

Target Account List Development

ONLY RELEVANT, TOP-TIER ACCOUNTS THAT MATCH YOUR ICP ARE INVITED TO THIS PARTY.

TAL DEVELOPMENT BUILDS YOUR ULTIMATE GUEST LIST.

Once the ICP is finalized, the resulting data points and criteria will be applied to the Total Addressable Market (TAM) in order to define the initial Target Account List. This typically means using the company database, augmenting that with third-party sources, and then using ICP data points, including intent data driven by AI-based and predictive analysis, as filters to eliminate companies that are not yet ready to target. It's like creating a video game character – you have to gear up for this mission.

Your first stop is the company database that's being used as the initial data set for the TAL. Analyze the database to ensure that it contains all the potential accounts that are relevant to the ICP. If there are high-value accounts that are excluded – add them!

Next, layer on the technographic and firmographic data points from the ICP, any other relevant third-party data points, and intent data. Refine the list to be as congruent to the ICP definitions as possible. Your character is beginning to come to life.

Now you just need to add more color and texture. If your TAL will gain value from further refinement based on third-party data from companies like Crunchbase, Bombora, or SpyFu, apply those filters. Sometimes you'll need to export the initial list from the ABM platform and use it as an input to various stand-alone tools and technologies. That output is then used to reprioritize or eliminate companies from consideration. The result is entered back into the ABM platform. You're ready to play.

Present your TAL to the leadership, sales, and marketing teams for a final round of collaboration, and you're ready to begin. Make revisions quarterly based on new data points and check to ensure marketing and business priorities are still being reflected.

Persona and user journey development for decision makers in these accounts is the next phase of the project.

HERE'S THE FULL RECAP:

Uncover your initial TAL

Create your TAL using your ICP as guidance. Talk with client sales teams and executives, assess industry standard job roles, and leverage existing industry expertise whenever relevant.

Pretty up your new TAL with useful information

Taking intent analysis a step further, layer in firmographic indicators (size, industry, technologies used, etc.) on top of companies showing relevant keyword intent to find accounts that fit ideal account criteria and show intent for priority topics and terms.

Do a fancy intent analysis

Using an ABM platform, upload a list of key topics and terms that prospects would be interested in. Ensure both high-, middle-, and bottom-funnel terms are reflected, as this will help with future segmentation. Create audience lists for companies who are actively researching these topics as a starter list for accounts.

Start thinking about how you will categorize accounts

Segment account lists based on high, medium, and low levels of effort. Keep in mind you may be willing to put more effort into high-value accounts.

1:1 – Fully customized marketing: This is the original ABM approach. One marketer works with a few key salespeople to create totally personalized marketing plans for a single target. It's high effort and reserved for high-value accounts.

1:Few – The clustered approach: Here you'll group together 5 to 10 accounts with similar characteristics and tailor existing or new content to their needs. Second-tier accounts are the typical targets.

1:Many – Casting a wide net: With supercharged targeting, refined personalization, and detailed analytics, one marketer can cover hundreds of accounts – yet make them feel like the only account in the world. It's the strategy of choice for lower-tier accounts.

Create your personas

Leverage existing customer data, market analysis, business goals, and other relevant data to develop buyer personas and user journeys for use in media activation.

STEP 7

Buyer Persona Development

TO UNCOVER BUYER NEEDS, TAKE OFF YOUR MARKETER HAT,

CLIMB INTO THE SHOES OF YOUR BEST CUSTOMERS, AND DO SOME WALKING.

Congratulations on your juicy Target Account List. But we hope you don't have a vacation planned anytime soon, because there's plenty more to do. Now comes the hard part: Think about what the people on your list need. It's hard because buying is hard. Any IT manager who has ever tried to get approval to buy a new software knows that it's a complete nightmare. No matter what you're selling, it's your job to make it as easy as possible for your buyer.

Your product is not nearly as important as your problem-solving ability.

You have to understand what they want from you and position yourself to be the answer to their needs. Who are they as people? What's going on in their world? And how can you be way more helpful than you are now?

Remember, people are mostly interested in themselves. You can brag all you want about the big names on your roster and spend big bucks on primetime ads, but if you're not speaking directly to your TAL's needs and fears, you won't get anywhere. Buyer personas are like the dating profiles of your customers. (You'll even give them catchy names like Finance Fran and Accounting Alex.)

HOW TO BUILD A
BUYER PERSONA

Who are the individuals in your TAL?

- ☐ What are their demographics (job title, income, location, age)?
- ☐ How do they behave both online and offline?
- ☐ What makes them different from other audiences?

What's happening in their world?

- ☐ What are their unmet needs and pain points?
- ☐ Are they even aware they have a need?
- ☐ Is anything in their way?

What's your vision to improve their work lives?

- ☐ What core values drive your brand?
- ☐ If your brand were a person, who would it be?
- ☐ What positive emotion do you bring to their life?

What makes you a worthy guide?

- ☐ What do you do better than the competition?
- ☐ What benefits are uniquely yours?
- ☐ How can you solve their pain points?

SUCCESS!

RECAP

WHAT HAVE WE DONE SO FAR?

- ✓ We became an ABM champion for internal stakeholders

- ✓ We evaluated and chose our tools

- ✓ We earned a PhD in account analysis

- ✓ We determined our ideal customers

- ✓ We created a Target Account List all our stakeholders love

- ✓ We drilled down to identify the individual buyers

- ✓ We walked a mile in their shoes to understand their needs

- ✓ We built the foundation for ABM success

Now let's create some campaigns!

CAMPAIGN DEVELOPMENT

You were the champion.

NOW YOU'RE THE ARCHITECT.

In this phase you'll build your ABM Grand Central Station.

Campaign development is the bridge that connects your foundation to your results. This is where you come up with a specific strategy around your TAL, then create the assets to support it and connect all the dots. There are a lot of moving parts in this phase, and you need to get them all to work together.

Preparing your ABM campaign requires no less rigor than the initial plan and strategy development work. It's a critical phase. We'd never tell you to take it lightly. But it can also be fun. This is where you develop your armor, cache your weapons, and build up your mats (materials, for the n00bs).

Ready, player 1!

STEP 8

Account Channel Identification

There are more media options than ever before.
Uncover the right channels for optimal results.

Search, social, display, PPC, email, live chat, out-of-home … the modern marketer has more options than ever before. And unless you've got the ad spend of Disney ($3 billion), you probably don't have the budget for all of them. You risk getting caught in what philosophers call the "Paradox of Choice" – but smart marketers use data to figure out what channels will help them reach their TAL. Hint: Smart B2B marketers also know that 80% of leads come from LinkedIn. If social is not a big part of your media mix, something is funky.

Let's start with the obvious: SEARCH

Search lets you capture existing demand as well as any future demand you generate through media. It's relatively low-hanging fruit, as long as you've got a good strategy and budget.

Search should be center stage as part of any full-funnel integrated ABM campaign because of the inherent value in the data. Leverage intent keyword information to align with key pain points that are being researched by prospects. You can also add in learnings from past campaigns, ABM or otherwise. The more you put in, the smarter your media campaigns become.

After search, you'll need to do some heavy lifting to determine which channels will provide the most bang for your TAL buck. Narrow down your target account channels using:

- Ideal Customer Profiles
- Account topic analysis
- Competitive analysis
- Account clusters
- ICP data points
- Account targeting capability

- Media efficiency and efficacy
- Channel targeting capabilities and limitations
- Channel technical and data integrations
- Historical performance
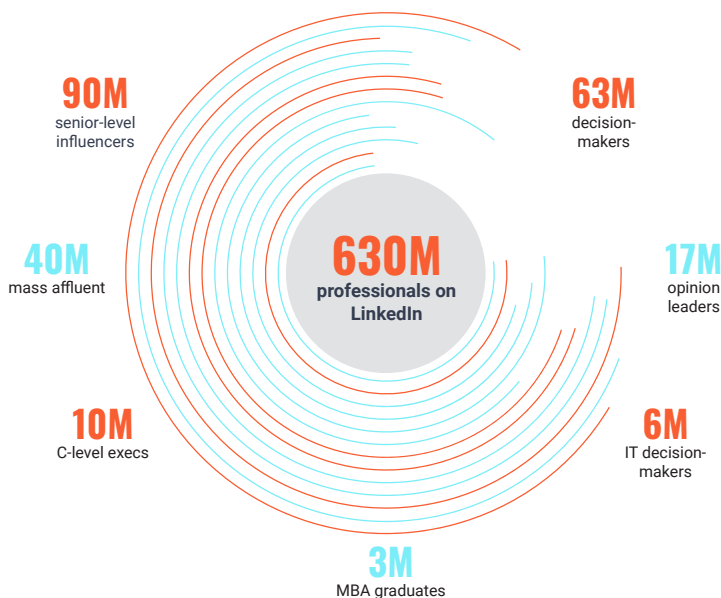- Predictive capabilities

You must break through the competitive noise, but also ensure front-end efficiency, by cutting waste from broad-reach tactics. For example, when looking at publisher placements, account targeting capability will be a must-have. Some common target account channels are:

- Programmatic display
- Paid social
- Paid search
- Online video

- Industry publications
- Podcast ads
- OTT

Account channel identification often comes down to expertise. Once you've played a level a hundred times, you start to understand how to win in the quickest, most efficient way. The same goes for ABM.

Another media hint: Use LinkedIn. 4 out of 5 people on LinkedIn "drive business decisions."

90M
senior-level influencers

63M
decision-makers

40M
mass affluent

630M
professionals on LinkedIn

17M
opinion leaders

10M
C-level execs

6M
IT decision-makers

3M
MBA graduates

Source: LinkedIn

Channel Stage Mapping

TIMING IS EVERYTHING

Channel stage mapping helps catch your customer on the right channel at the right stage in their journey.

Once you've determined your media channels, map relevant buyer stages and needs to each channel. Map out your typical sales cycle and break it down into distinct buyer stages that fit into the top (TOFU), middle (MOFU), and bottom (BOFU) of the funnel. What channels best align to the pain points and needs of your buyers at each stage? Some channels will be strictly TOFU, MOFU, or BOFU, while others will continue throughout the journey and act as more evergreen tactics.

As we've mentioned, LinkedIn is especially valuable for B2B marketers and can be used to target any stage of the funnel. At the top, raise awareness by targeting a list of companies or certain audience attributes. In the middle, retarget your website visitors. At the bottom, use LinkedIn's Matched Audience function to target visitors that specifically converted on a MOFU offer or visited BOFU website pages like Contact or Pricing. The same principles apply to Facebook advertising.

Some channels are suited for just one stage of the funnel. Display tends to work well for kickstarting a journey and building awareness. Search is more suited to solution discovery, problem research, and branded navigation. For MOFU, you want media that will help you connect with potential customers and help move the buyer to BOFU.

After you map the channels to your buyer journey, start to think about the user experience. How is your target consuming that content and on what device? This can help you assign the right measurement KPIs and create a more effective media mix by allowing channels to do what they naturally do best. This creates a better and more relevant experience for your target audience.

Content Mapping

To put the right content in the right places, you're going to need a lot of assets and a kickass editorial calendar.

You have your channels identified. You know your targets. And now you've aligned them against the buyer's decision journey. Time to make sure you put the right content in front of the right person at the right time. To do that, you're going to need a wide variety of content and formats.

First take a look at your existing content and creative to see if you can use it in your latest campaigns. What content is appropriate for each buyer stage and channel combination? Identify gaps where you'll need more assets and make a plan to repurpose content or create all-new material. Do you have a ton of blog articles, but no white papers? Turn those blogs into gated thought leadership content. A lot of social ads, but no display ads? A little resizing goes a long way.

List all the usable assets for your campaign. (Hopefully, you have a very long list!) Now map it out. Use your ICPs, TALs, buyer personas, and other relevant data to map creative and content to the appropriate channels and buyer stages. Get to know your audience. Learn their preferences. Is your audience more responsive to ebooks on LinkedIn, and webinar registration on display? This will give you a starting point, but you'll need to test and refine over time.

AWARENESS
• Videos • Blog posts • Social media posts • Infographics • Quizzes

CONSIDERATION
• Newsletters • Events • Whitepapers • Webinars

DECISION
• Case studies • Pricing • Demos

You're not done yet. Creating a kickass editorial calendar is the last step. Develop a calendar outlining the creative and content necessary for media activation. Creative and content needs may be defined by time, theme, channel, ad specs, etc. According to the Content Marketing Institute, a documented content strategy is often a key indicator of content marketing success. **Don't skip this essential step!**

Content Development

IF YOUR CONTENT SUCKS, YOUR CAMPAIGN WILL FAIL. GIVE YOUR CREATIVE TEAM A DECENT BRIEF AND YOU'LL BE RICHLY REWARDED!

Content is what sets apart a successful campaign from a mediocre mess. Remember Blockbuster's 2010 comeback campaign or Radio Shack's "Do It Together" ads? Yeah, neither do we. Your content – videos, digital ads, infographics, blogs, whatever – must resonate with your audience and bring something new to the table.

 Don't just guess at what's going to fit the bill. Do your research. Find the topics everyone's talking about – using keyword research, social media tools, and competitive analysis – and put a fresh spin on them. Have an opinion. Go against the industry grain. Give a new perspective. Just make sure you're sticking to your expertise so that your content has authority in its space.

A senior creative team should be a part of a brainstorming and strategy session. Be as specific as you can about your goals, point of view, and types of content needed – but leave room for creativity. Give them good customer insight and tell them you expect greatness.

AND WHAT IS CONTENT GREATNESS?

We've boiled it down to Three Truths:

The real value of content marketing is your list, not the content.

Content, messaging, and branding are really just proxies for relationship building. Getting inside someone's head. Literally. You build relationships with the people and accounts on your list. So the content you create must be in service to that relationship.

You must behave like a guide worth following.

You thought you were in the content business. You are not. You are in the behavior business. Relationships are forged via behavior, not just talk. Your company is either behaving like a brand who wants to make it easy to do business, or you are not. There is no middle ground here because your buyers don't have the time or desire to think for you.

Guides worth following create beacons for information-starved buyers.

Notice we said create beacons, not content. Beacons are prominent waypoints that help guide buyers safely from point A to point B. When was the last time you created a waypoint to help buyers navigate the sale? ABM requires marketers to stop talking about products and services and help buyers all the way to a sale.

When you review creative, use this list: Punchy, helpful headlines – check. Insightful social media copy – check. Kickass imagery and videos – check. Intriguing thought leadership – check. When your team is passionate, skilled, and filled with ideas, they create great content that connects with audiences emotionally, speaks to them intelligently, and shows them your brand personality.

STEP 12
Media Plan Development

Break out your running shoes and haul ass back to Media

Media plan development is where your ABM campaign goes from strategy to activation. Successful media plan development builds from and leverages everything we have done so far. Focus the media plan on account and buyer persona concentration, budgetary constraints by channel, and buyer stage. Identify additional ways to microsegment as volume allows (e.g., further breaking out campaigns by industry).

Make your media plan smarter by modeling out potential performance scenarios using benchmark metrics. Then you can play with allocation scenarios by channel to get to an optimal mix that balances cost efficiencies against revenue and pipeline goals.

PRO TIP

Make sure to include all data and technology costs when budgeting. Don't just focus on the cost of media or you won't have a true picture. Consider the ways that your media will need to be segmented to align to creative personalization, and make sure you don't spread yourself too thin. If the creative plan includes personalization by industry, you'll need to set up industry-specific campaigns for channels that are less natively personalized, like LinkedIn, which requires a new campaign for each unique audience.

You also need to consider targetable volume – if your campaign audience is extremely niche, you'll have a hard time achieving volume, and on platforms that are more privacy-minded, you may not be able to run at all.

Consider the following basics when you begin planning your media. These will serve as anchors for any successful media campaign:

⊙ ⊙ ⊙

DISPLAY

Account-targeted providers often have less strict rules here, and you can get as extreme as 1:1 campaigns, but you must think about scale. Someone will need to monitor and optimize every campaign that is set up – if you have a unique campaign for 200 accounts, that quickly becomes someone's full-time job. Use dynamic creative wherever possible to make this a more realistic and scalable undertaking, while still taking advantage of the ultra-creepy 1:1 capabilities.

LINKEDIN

These guys are STRICT! Your campaign won't run with <300 matched members, and really, anything below a few thousand will have major struggles scaling. Depending on the size of the companies you're dealing with, or the diversity in the titles of your buying committee, scale can be a huge challenge. You'll need to get cute with how you personalize. Maybe you can't do a campaign for each title group by industry – what other elements could you personalize? A good starting point may be pain points: which industries and titles have common challenges they're trying to solve?

SEARCH

Take advantage of search data for buy signals to ensure the media mix supports the entire buyer journey. Blend a mix of keywords and ad groups with strategically assigned landing pages to balance efficient and relevant reach. Paid search is also a great way to test content and response rates by audience.

First-party MATCHING

Most places where you can upload email lists for targeting have strict thresholds, again, to protect personally identifiable information. Plus, with lower match rates for business emails in many systems, scale is also a major consideration. We generally like to stick to 1,000+ records for email list matching to have even a prayer of delivering.

Lastly, build a testing framework into the budget and media plan. Don't overcommit every penny. Look at your media as a portfolio and maintain fluidity between tactics based on actual performance. Take advantage of real-time trends in the market and use them to your advantage. You want to be agile. Test, fail fast, learn, and optimize within the current plan as well as adding and removing partners as needed. Don't be shy about driving your performance. Your ABM success can come down to how well you manage your media plan. Machine-learning algorithms and programmatic technology will only get you so far. Proactively manage your plan.

SUCCESS IS IN YOUR HANDS.

STEP 13

Messaging Strategy

LEVEL UP YOUR CAMPAIGN WITH A MESSAGING STRATEGY THAT BOOSTS PERFORMANCE AND PROVIDES KEY INTEL.

So you have a media plan. What do you do with it? The beauty of digital media is the ability to dynamically personalize and then measure preferences. TL;DR: Build a messaging strategy on top of your media plan. And test it as much as you can without hurting the program.

Testing is critical to the overall success of ABM. Before your team types a single letter of ad copy, develop the key messaging for each piece of the media plan. Bake in A/B testing opportunities for the messaging, copy, and imagery.

Some areas to consider for your testing strategy include:

• Value props: Which aspects of your product or service are most interesting to customers?

• CTA: What words encourage the most clicks?

• Tone: Does your audience respond better to a serious, intellectual approach or an informal, conversational message?

• Level of personalization: Does including company name, job function, or industry resonate better than a general approach?

• Imagery: Do branded images or lifestyle images work best? What colors grab your audience's attention?

Don't forget to test new and existing landing pages. Testing where you send a potential customer after they click is just as important as testing your ad copy. The best-planned media will still underperform without relevant messaging and good content on the landing pages.

STEP 14
KPI & Reporting Alignment

KPI alignment can feel like a grind.

BUT LAUNCHING WITHOUT PROPER TRACKING IS UBER GRIND-Y.

To watch all of the magic happen, you have to ensure proper tracking and data flow is set up from the start. This includes implementing and QA'ing relevant technology pixels. Launching with poor or nonexistent performance data tracking is a big no-no.

ABM KPIs are different from traditional marketing for a few reasons:

1

ABM TAKES TIME

The gap between the top and bottom of the ABM funnel is much larger than a typical cycle. Metrics like revenue and ROI are going to take longer to produce results.

2

ABM IS HIGHLY TARGETED

Because ABM focuses on quality over quantity, funnel metrics like conversion rates, total website traffic, and even marketing qualified leads aren't the way to go.

3

ABM REQUIRES ALIGNMENT

Sales teams are used to certain KPIs – in fact, their entire job depends on them. Finding common ground with sales is a must in ABM.

Implement and QA the relevant technology pixels to track the KPIs that matter most, like:

ACCOUNT PENETRATION
Number of contacts added to an account

ACCOUNT AWARENESS
Website traffic attributed to people at your target accounts

ACCOUNT ENGAGEMENT
Amount of time people at your target accounts spend with your brand

REACH
Number of accounts reached per media channel

RATE OF ACCOUNTS ACCEPTED
Number of accounts activated per hundred accounts prospected

DEAL-TO-CLOSE TIME
Number of days between first contact and close of a deal

CLOSE RATE
Percent of deals closed

Align measurement and reporting so that you're mining valuable insights from all that data. If you don't, your conversion optimization ability will be significantly limited. Aligning your KPIs is part data, part technology, part people, and a lot of process. In the end, it's what allows you to maximize your efforts instead of wasting your energy.

RECAP

WHAT HAVE WE ACCOMPLISHED SO FAR?

✓ We found the channels that provide the most bang for our buck

✓ We mapped out how to put the right content in the right places

✓ We created kickass content with our creative team

✓ We built our optimal media plan and figured out how to test it

✓ We chose the KPIs that will give us the most valuable information

Let's light this candle!

GO TIME

Go time means go!

AFTER YOU DOUBLE CHECK EVERYTHING FIRST.

Here we are. Time to drive. Time to launch. This is what we've been planning for. So let's go. Well now, pump the brakes. Let's not give up on rigor, process, workflow, and attention to detail. Remember this process will change how your organization thinks and operates going forward. According to Forrester, 62% of marketers say they can measure a positive impact since adopting ABM. Once you make this final push, you'll be a true ABM champion.

You must go in with your eyes wide open. Think through every scenario from measurement to trafficking, metrics, and even reporting cadence and what is included in each stakeholder's dashboard. Plan for how frequently you check in with sales. Set expectations across the organization from the start, and you'll minimize resource constraints and ensure a smooth launch.

Let's go!

STEP 15
Launch

PRE-LAUNCH CHECKLIST

☐ Double check your TAL against the TAM and make sure you are still comfortable with the media recommendations. This may seem overly simple, but things can change and change quickly, so pause and just make sure everything is where you want it.

☐ Review the ICP and buyer personas. You want to make sure all of the important criteria carried over to your media tactics and segmentation. Be mindful here, sometimes there can be a "lost in translation" from TAL and ICP to media segments.

☐ Check the account and intent analysis. Make sure the most valuable insights are being applied for launch. Other interesting, but not mission-critical insights can be prioritized for later testing after the initial round of optimizations.

☐ Double check content mapping. Make sure the right ads, video, copy, landing pages, etc. are assigned to the right sites/placements/creative. Remember, the best designed media will fail if the content is bad or mapped poorly.

☐ QA your tracking tags. This cannot be stressed enough. Make sure the tracking is set up and the media is being measured properly. Use common sense and trust your judgment. Look at delivery numbers. If anything feels wrong, it probably is. Better to catch tracking problems early than to have been running a couple weeks or more to find broken measurement and be unable to prove results.

STEP 16
Campaign Optimization

You're live, and data's pouring in. It's time to switch to analysis mode and turn that data into insights.

Now that you're live and have data coming in, it's time to turn that into actionable insights. The key here is to distinguish between reporting and analytics. To be successful at ABM, you need to do more than just stitch together delivery and performance data. You need to monitor your campaigns daily and use that information to improve your return on ad spend (ROAS).

As you are pulling in campaign data to monitor delivery, make sure to clean it up, de-dupe it, and verify it. Fill in the gaps and begin to formulate some theories on what is driving up and what is pulling down performance.

From there, create a list of optimizations. Review them with the team. Be sure to review the pros and cons and make note of potential pitfalls. Then prioritize them. Roll them out in batches so you can control and better manage campaign changes efficiently.

Campaign Optimization Opportunities

- Bid strategy updates and budget pacing
- Minor targeting updates (e.g., placement exclusions, negative keywords)
- Identify new testing opportunities
- Identify budget reallocation opportunities
- Adjust bids, creative, keywords, and landing pages
- Examine intent data along with campaign performance metrics to determine target account expansion or reduction opportunities

Campaign optimization also helps you build a baseline of results so you can better pinpoint incremental value. A baseline is critical or you cannot truly begin to weigh optimization impact. We'll say it again: It's all about ROAS.

STEP 17
Weekly & Monthly Reporting

READY TO IMPRESS YOUR CMO? REPORTING DONE RIGHT IS A SEXY BEAST THAT MAKES EVERYONE LOOK GOOD.

Setting the right cadence to support successful ABM can be trickier than it seems. Too frequent and you end up optimizing based on anomalies and not trends. But too infrequent and you miss in-market opportunities. Reporting must find the ideal compromise and support the team in both the short-term and the long-term.

 Short-term, weekly status check-ins "keep the trains running on time." They tell you what's happened – and what hasn't happened. This type of reporting should focus on the key numbers so the team can manage delivery. One metric to report on weekly is surging target accounts. This is based primarily on website traffic you receive through your media programs and shows which accounts have high intent on priority topics.

 Longer-term monthly reporting optimizes the train schedule for maximum efficiency. It should fuel advanced analytics and big-picture planning by taking deep dives into CX, competitive activity, market dynamics, performance triggers, CTA testing, and more. This element should be impact focused and centered on usable metrics than can drive immediate performance gains. It answers the question; "What are we going to do about it?"

ISOLATE THE DATA THAT TELLS THE STORY OF HOW ABM IS AFFECTING THE BOTTOM LINE.

Use it to create an actionable report the C-suite can use to evaluate its effectiveness.

CATEGORIZE

Different strategies require different metrics. You'll at least want to separate acquisition and expansion campaigns. You may want to break it down even more and report on:

- Target prospect accounts
- Target customer accounts
- Engaged target accounts
- Target account opportunities

COMPARE

Weigh your results against more traditional sales and marketing initiatives. You'll add context (and make yourself look good!).

KEEP IT SIMPLE, STUPID

CEOs are smart – but they're also busy. A simple scorecard like the one below provides a good overview before you dive into the specifics.

The Six Metrics That Power All ABM Campaigns:

Awareness	ADR Touches	Engagement	Sales Appt	Pipeline	Opportunity Size
XX% of all target accounts are aware	XX% increase in account touched by ASDRs	XX% of all target accounts are engaged	XX% of meetings were from target accounts	XX% comes from target accounts	XX% increase in deal size
(XX% change)	(XX% change)	(XX% change)	(XX% change)	(XX% change)	(XX% change)

Sales Alignment Check-Ins

Your last hurdle: Close the feedback loop between sales and marketing

The last time we thought about sales and marketing alignment was way back in Step 1, and now it's time to check back in. All too often marketing goes to sales with MQLs they have already been working on for years. This is just one example of how alignment can break down. Here's how to avoid miscommunication:

MARKETING

Bring sales usable information surfaced from campaign monitoring and reporting insights

SALES

Give marketing feedback regarding what information buyers find useful

Determine a regular cadence with the sales team to meet, share knowledge, and discuss challenges and wins. Ask sales if lead quality is as expected and what specifically is bad (and great!) about the leads. Find out if the companies being targeted are meeting their needs. Ask what you can do, change, and measure to help them. Be sure to use the information you gather from sales to refine your campaigns.

Leverage technology to help here. Workflow tools and other options abound. Leveraging the API integrations within your ABM platform and Salesforce is a great place to start. Automated alerts between sales and marketing are a helpful way to keep each other informed.

Sharing performance and insights with sales and refining marketing and media based on sales' input will do three major things to drive long-term ABM success:

1

MAINTAIN A HEALTHY LIST, LOVED BY ALL.

Your TAL must evolve over time to maintain a healthy pipeline and deal flow.

2

FOSTER COLLABORATION AND REINFORCE ALIGNMENT.

Focus on needs, not products, to grow trust that will yield better customer experiences.

3

PROVE YOUR IMPACT.

Drive revenue, gain high-quality customers, and improve sales velocity through smarter media and personalization.