

# 2021 STATE OF ABM

BLENDING TRADITIONAL DEMAND GEN  
WITH ABM, FOCUSING ON INTENT DATA &  
PERSONALIZATION TO BOOST ENGAGEMENT



# Introduction

While there's no shortage of best practice claims for account-based marketing (ABM), there's plenty of certainty surrounding its success.

*Demand Gen Report's 2020 ABM Benchmark Survey* found that marketers who utilize ABM strategies have seen positive trends and results when using or reinventing their ABM strategies. Seventy three percent of respondents indicated that ABM has greatly exceeded their expectations, pointing to efficient use of marketing sources (53%), a clearer path to ROI (37%) and more trustworthy results (36%) as some of the major payoffs they've seen.

"ABM is one of the most effective kinds of B2B marketing," said Rob Leavitt, SVP, Consulting of **ITSMA**, in an interview with *Demand Gen Report*. He cited company research that shows ABM has a higher ROI, drives more revenue and generates more relationships compared to other marketing strategies.

However, despite visible success, **research** shows that many companies are still hindered by common marketing challenges, such as lack of internal resources (36%), poor alignment between marketing and sales (35%), developing target account personas (31%) and predicting which account will purchase (31%).

This report will address those challenges, provide actionable solutions and discuss:

- How marketers are blending traditional demand gen strategies with an account-based approach;
- How a Fortune 500 company saw 94% engagement increase with intent-driven ABM;
- Methods to increase engagement with target accounts;
- Best practices, missteps and a future look at ABM;
- The advantages and limitations presented by intent data;
- The six steps organizations can take to connect ABM to the buyer experience; and
- How to personalize ABM functions at-scale.

# Q&A With Randi Barshack, CMO, Rollworks: The “Resurgence” Of Account-Based Marketing

While many marketers view account-based marketing (ABM) as a relatively new strategy made possible by technology advancements, Randi Barshack, CMO of **Rollworks**, takes a different approach. Instead of viewing ABM as a novel approach to marketing, she believes the ABM trends we’re seeing now are actually derivative of marketing strategies from years past that are re-energized by enhanced technology capabilities. To find out more information, *DGR* sat down with Barshack to discuss the resurgence, the technologies enabling it and what the future holds.

***Demand Gen Report: Why do you think that today’s ABM strategies are an adaptation from decades ago? How have technological advances contributed to this evolution?***

**Randi Barshack:** We’ve always been looking at accounts, even when we were at the height of personalized marketing one-to-one, but our excitement about personalization took us on a bit of a detour. For example, let’s say we’re engaging with someone named Angela Jones from Acme Corp. It’s not that we’re particularly excited about the fact that her name is Angela; we care about who Angela is in the context of her role at a particular company.

Some of the marketing technologies that emerged from 10, 15 years ago allowed us to know who Angela was, her specific path and how she interacted with us on a super granular level. It caused us to become so laser-focused on the individual that we lost sight of the fact that B2B is not about the individual and rather who the individual is in the context of an account.

Now, we finally have all that granular data and the ability to contextualize and understand how that individual fits into an account and how Angela’s actions fit with others from the buying committee within her company. I think we took a bit of a detour on our path to being enthralled with the ability to personalize. We went too deep into the individual and lost sight of the account, and now I think we’re back and we have the capabilities to do that with an account lens.



***DGR: At its core, what is ABM about? What are the most important steps organizations can take to improve ROI?***

**Barshack:** ABM is about efficiency and the ability to align your resources — whether it's marketing's budget and time or sales' resources and efforts — with the accounts that matter the most. These accounts — or target account list (TAL) — should be reflective of those proven algorithmically to be the best fit with those demonstrating intent at any given time.

Ranking that list into tiers helps go-to-market teams further refine how resources could be allocated. For example, for accounts that are a high fit and exhibit intent, you might want to gain their attention with a high-end gift (from marketing) coupled with personal SDR outreach. Accounts that have a high fit but might not be showing intent might be good for account-based advertising to increase brand awareness.

One common mistake we see if companies trying to have massive TALs without any type of ranking or tiering. For some channels, like email marketing or broad scale advertising, it is possible to have massively scaled ABM, but tiering allows you to refine that and engage many more channels that might take more resources.

With account-based advertising, for example, you might allocate a more concentrated budget on targeting the top tier accounts and optimize the frequency within accounts that SDRs would have the bandwidth to reach out to in 20 days or so. Even something with this simple level of coordination — created by air cover — can create better connect rates for SDRs. ROI is garnered in the ability to reach accounts, the efficiency of SDRs and the ability to accelerate sales cycles.

***DGR: What are some of the biggest challenges companies run into when implementing, restructuring or scaling ABM? How can they combat them?***

**Barshack:** The biggest challenge is getting buy-in from marketing and sales teams. This is probably the most unfortunate one, because internal cohesion creates such amazing levels of efficiency if you can get sales to buy-in to having a target account list, scoring and ranking that list, and coordinating marketing and sales outreach. The biggest challenge is getting over that hurdle. And once you get there, you're on a good path to implement ABM.



If marketing and sales work together to create that target account list, whether it's for a specific campaign or across the entire go-to-market strategy, that's great. It's important for marketing leaders to allow sales to take a first pass at that list to ensure it aligns with what sales is doing. Rather than trying to force the list, even if it might be more accurate because you're using more data, the buy-in is more important than the accuracy. Once you get the buy-in and sales sees the results, you can go through another round with more accuracy.

***DGR: Where do companies typically misstep when scoring the success of the engagement their ABM strategies drive?***

**Barshack:** ABM isn't about increasing engagement rates in general; it's about increasing engagement rates with the accounts that matter. Most marketers out there would say they'd rather have less high-quality responses than more low-quality responses. ABM allows you to put your funnel on a diet — you don't need a big wide funnel; you can have a narrower funnel that looks like a champagne flute.

***DGR: Why is ABM important for a company's continued success? What does the future hold?***

**Barshack:** There's a message that your competitors are likely utilizing account-based strategies using ABM strategies and if you're not, you're falling behind. A large part of ABM is the ability to identify intent signals or target account lists to identify prospects you may not be currently engaging with. There's a resurgence because it's always been about accounts. It's about how the technology has advanced to the degree that we can identify the buying committees within the accounts, both those we have and have not engaged with. Skinnier funnels and more marketing optimization are common objectives that are valuable in the go-to-market pipeline that aligns sales and marketing. That alone removes a lot of the ambiguity between marketing and sales team, so you're going to see more tightly aligned go-to-market teams with a newfound level of respect for the disciplines.



# Prioritizing Personalization For Greater Account Retention

While experts agreed that the personalization level with ABM is suitable for attracting new clients, external factors forced companies to shift their priorities to client retention over prospect generation.

“In the last year — with the pandemic and economic disruptions — ABM became even more valuable because many companies shifted their focus on existing customers over generating new ones,” said Leavitt. “With your existing customers, you have a lot more information and a relationship with them, so it’s that much easier to be more personalized, targeted and relevant with your marketing.”

Given the popularity of personalization — **research** showed that 42% of respondents are personalizing their content to increase account engagement and build long-term relationships — it’s no secret that it’s not all smooth sailing. In fact, that same research showed that 35% of marketers are still struggling with personalization.

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**ROB LEAVITT, ITSMA**



To help increase personalization success, Leavitt suggested marketers refer to what he calls the three “R’s” of ABM:

### REPUTATION

ABM strategies must showcase expertise, thought leadership, reliability, trust and responsiveness, as ABM can strengthen or change a company’s reputation with target accounts;

### RELATIONSHIPS

Marketers and sales teams should focus on building relationships with clients instead of pitching to them, which promotes brand advocacy and helps form stronger partnerships; and

### REVENUE

ABM is revenue-focused at its core, and teams need to ask themselves if they’ve generated and accelerated new opportunities to help close deals.

According to Mark Ogne, Founder and CEO of **ABM Consortium**, the difficulty with personalization is attributable to companies focusing too much on one aspect of the data and not opening their eyes to the bigger picture.

“Each source of insight is a piece of a puzzle, and while those puzzle pieces may include intent data, a content portal or website behaviors, they are incomplete on their own,” said Ogne. “Incomplete or incorrect insights corrupt personalization efforts because they cause marketers to personalize with the wrong content.”

According to Ogne, most organizations struggle to see success with their ABM personalization efforts because:

- The content is reflecting the desires of the marketers, not the needs of the buyer;
- Personalization doesn’t come from an extensive knowledge of the target audience; and
- Marketers assume they can send the same message to multiple accounts in a similar industry or provide similar solutions.



# Fortune 500 IT Company Increases Engagement By 94% With Intent-Driven ABM Strategy

An almost \$1 billion Fortune 500 enterprise IT solutions company wanted to evolve its marketing strategy to reach its goal of becoming No. 1 in its field. Throughout the company's two decades in business, it had relied on inbound marketing to drive buyers into its sales pipeline.

However, the organization realized it needed to add ABM to its toolset so it could be more strategic about identifying the right buyers at the right time in the buying cycle.

## Challenge

The company lacked the ability to measure success metrics. Specifically:

- Understanding its customers' journeys to better target marketing efforts;
- Identifying upsell and cross-sell opportunities;
- Attracting new accounts via digital channels;
- Overcoming an existing lack of personalization based on affinity and intent data;
- Measuring the success of its ABM program; and
- Making buyers aware of what its full portfolio of offerings.

The company needed a partner that could offer a range of ABM solutions to help set up a new program of targeted and personalized experiences, backed by AI-driven data and insights.





## Solution

To help identify ideal buyers through data and drive contextual engagement, the company turned to **Dun & Bradstreet's** (D&B) datasets and platform. The companies worked together to use AI and data to build predictive models that identified the best accounts to target with cross-sell and upsell opportunities.

The company relied on D&B's predictive model to analyze buyer profiles and help identify when buyers might upgrade or what their next actions might be through affinity and intent data. Armed with data and predictive modeling, the company targeted buyers that showed interest in similar products.

Additionally, the organization wanted to use digital channels to extend awareness and attract new demand. This meant using data, drilling down with dimensions and generating strong messaging to demonstrate the company's value prop. D&B's data and insights provided a foundation to understand intent and other behavioral signals that helped build targeted segments to capture the right audiences. Those insights were then activated and multichannel tactics were deployed, including programmatic, paid search and paid social ads.

To show buyers the right message at the right time and create personalized web experiences with relevant offerings and customized CTAs, D&B helped the company build best-fit profiles. Those profiles were based on a foundation of intent data that generated personalized messaging based on buyers' interests in solution areas and their stage in the buyer journey.

**D&B Lattice** helped the company see which accounts were searching and which were active, helping it realize potential cross-sell opportunities. Based on this, the company created a "frequently bought together" path based on products customers frequently bundled to drive interested buyers to more solutions. The organization also developed cross-sell messaging based on the product the customer was likely to buy next.

To empower sellers with insights to prioritize accounts and enable a more contextual, engaging conversation, the company relied on D&B's data and insights to provide a global view of buyers and their buyer's journeys. This helped it gain an understanding of where buyers are in their sales journeys so sales teams can have meaningful conversations that lead to conversion.



## Results

Since implementing D&B's ABM programs, the company received positive feedback on conversations between its sales teams and customers and saw higher conversions and engagement. It found that customers gained information and awareness of the company's offerings at every stage of the journey, even before engaging in sales conversations.

Specifically, the company saw a:

- 25% higher conversions on up-sell/cross-sell efforts;
- 20% increase in customers signing up for trial offers;
- 94% increase in engagement; and
- 5X pipeline through digital channels.

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“The core element to ABM really sits within digital and data. It’s about the digital and programmatic tactics of how a campaign integrates with demand gen activities, sales priorities and account-level data.”

**ALEX SOUTHWORTH, DUN & BRADSTREET**



# Leveraging Intent Data To Identify Buying Signals

With the ability to integrate into Salesforce and existing CRMs, account-based intent data solutions collect web users' information and track their behavior to determine where they're from, their interest level, their likelihood of taking a specific action and identify what that action might be. According to [research](#), 63% of marketers are already using intent/behavior signals (an 8% increase from 2019), with 28% indicating they plan to incorporate them.

The ability to accurately generate intent data ensures a successful baton pass between marketing and sales. However, to achieve that, Leavitt explained that the intent data review process needs to occur on two levels: Strategic and tactical.

Strategically, he explained that marketers must do their homework to understand the specificities of each account's needs. Marketing might view an account that downloaded three blog posts and listened to a webcast as a promising lead, but sales could explain that they've been dealing with the account for years and they're unlikely to buy.

On the tactical side, Leavitt said that approaching a prospect needs to be interactive, smaller, more intimate and innovation oriented. Customers are looking for new ideas and information, but they don't want a sales pitch. Marketers need to present an understanding of the account's issues, create a compelling future vision and relay it to the sales team, so reps can immediately open lines of communication with targeted insights and actionable solutions.

Of course, successful analyzation of intent data is only helpful if the data is high quality. It needs to be specific enough to generate accurate insights into the needs and desire of a company, as well as gauge how likely they are to act and what they're specifically seeking from a platform or solution.

"Data quality is so important — think of it as the gas in your ABM engine," said Russo. "If you have bad gas, you're going to get bad performance; if you have premium gas, you'll have premium performance."



However, there are limits to intent data's accuracy. Leavitt cautioned that account-based intent data is not as useful when targeting large corporations, as you can't determine who from the company is browsing the web page or what their buying power is. For example, he recalled a project that one of his clients worked on with a major oil company. When analyzing the data, the company believed it had hit a home run.

"The client would say, 'Oh, my gosh, we ran ads and the personal landing page, and we got 100 people from the oil company,'" continued Leavitt. "So, I asked, 'who are those 100 people? Are they people fixing oil rigs in West Texas, or are they executives?' There are limits to intent data when it's account-based, so it's important to recognize those limits."

Despite its limitations, intent data is growing in its usefulness and importance. In fact, it's one of the many elements of traditional demand gen strategies that are quickly finding its place in the ABM funnel.

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**JON RUSSO, B2B FUSION**



# 6 Steps To Reconnect ABM To The B2B Buying Experience

By Pierre Custeau, *MRP*

The B2B purchasing journey is notoriously long and arduous, requiring a coordinated sales and marketing effort to influence networks of stakeholders whose input, recommendations and decisions can fast track or derail a sale at almost any moment. This difficulty is evident to all: Research shows that more than three-quarters of B2B buyers describe their purchasing journey as very complex or challenging

According to Google Research from Jan. 2021, this complexity accelerated during the COVID-19 pandemic, as business priorities shifted and buyers and vendors alike “brought work into our lives” instead of “went to work.” Marketers, most of whom were already disappointed with ABM results prior to the pandemic (87%), must find new ways to deliver a contextual customer experience in the midst of complexity or lose ground to those who do as purchasing behaviors and cycles rapidly evolve.

## The B2B Buying Experience Gap

Target accounts interact with marketers across channels, so marketers must engage them between platforms. At face value, this concept is intuitive, yet fails at scale. The average considered B2B purchase involves researching prospective vendors using an average of six channels, and two-thirds of buyers leave the process disappointed.

ABM promises to use data and personalization to make it easier for buyers to buy, empowering marketers to construct account-based programs based upon buyers’ dynamic needs and preferences that arise rather than executing top-down campaigns. However, several challenges disconnect marketers from the B2B journey and keep ABM success tantalizingly out of reach.

Common but critical difficulties include losing control of data and visibility into target markets and an inability to scale in the delivery of high-impact engagements. At the tactical level, marketers often struggle to identify the right accounts to focus on at the right time, as well as stand up the right campaigns to orchestrate effective handoffs between marketing and sales teams.



In addition, ABM efforts are compromised by organizational data silos and the lack of a unified, comprehensive source of data to personalize the customer experience. In parallel, ABM can go quickly off track when siloed from other multichannel marketing efforts and “bolted on” to existing programs.

## 6 Steps To Reconnect

Connecting ABM to today’s B2B purchasing journey requires enterprise-class capabilities to derive actionable insights from data, personalize communications and stay in perfect step with target accounts and buyers across every channel. For marketers who want to reconnect, these six simple steps will help simplify operational complexities and drive bottom-line performance:

### **1. Collaboration Between Sales And Marketing**

Only 36% of companies executing ABM programs consider their sales and marketing teams tightly aligned, despite years of conversation about “alignment.” The goal is to find ways for sales to participate in a coordinated manner with your ABM program. To move forward, companies must provide transparency through real-time intelligence that includes account-focused engagement reports, proactive sales alerts and notifications and more.

### **2. Prioritize Enterprise Administration**

Consider a single platform with multi-tenant capabilities to ensure the freedom to build, manage and measure multiple, simultaneous ABM programs while sharing insights, targeting and methodologies for measurement.

### **3. Integrate Data Intelligence**

Seek out enterprise-ready master data management technologies that organize, cleanse, map and append data to improve insights and reporting. This provides a powerful foundation for accurately targeting and personalizing the buyer journey across channels.

### **4. Create A Full Picture Of Target Accounts**

Combine intent data with predictive models to gain a solid understanding of audience needs and their propensity to act, then determine the best engagement approach at enterprise scale.



## 5. Orchestrate Across Channels

To deliver high-value sales and marketing actions, coordinate and prioritize activity between marketing teams and ensure message consistency through advanced controls, real-time triggered connections and recommended “next-best actions.”

## 6. Map ABM To Business Objectives

Embrace common measurement frameworks that align to existing KPIs and systems, and the capability to view ABM activities across individual programs and global teams.

## What Does This Mean For ABM In 2021?

For organizations that already market in multiple channels, true customer experience success is challenging, yet fundamental to success. To effectively connect to the B2B purchasing journey, marketers need to embrace the view of customer experience as a dynamic path defined by each buyer and target account.

With this understanding, marketers can effectively assess and coordinate their target account marketing — even within general marketing programs — and use all the data at their disposal. This includes using intent data and predictive analytics to identify actionable target account insights, needs and timing to see sustained success in the months ahead.

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**PIERRE CUSTEAU, MRP**



# Blending Traditional Demand Gen & Modern ABM

Over the past few years, marketers have realized the multiple levels of overlap between ABM and demand gen. In fact, research showed that 58% of organizations integrated their traditional demand gen and ABM strategies to streamline their marketing efforts.

“There’s an operational connection between ABM and traditional demand gen initiatives,” said Leavitt. “A lot of companies have invested to make their demand gen marketing strategies more efficient through email marketing campaigns, events and social media campaigns. All of those tools and systems can and should be used for complex marketing, but in a more targeted, personalized, smaller-scale way.”

This blend of strategies enables organizations to strengthen the lead qualification process, and lessens the time and guesswork dedicated to which prospects are likely to make a purchase.

“If you look at demand gen 10, 15, even 20 years ago, the traditional approach was reaching out to prospects, getting a lead, conducting a bank qualification, ensuring you were talking to the right person... there were a lot of steps,” said Alex Southworth, VP of Marketing for **Dun & Bradstreet**.

By nature, ABM forces more sales and marketing teams to work in close alignment, which opens the door for streamlined communications. Jon Russo, CMO and Founder of **B2B Fusion**, explained that oftentimes, companies have too many funnels running simultaneously, which ultimately leads to confusion.

“I think marketers go wrong when they say, ‘I’ve got this lead/account funnel and sales has its own funnel,’ when you really should have one funnel that takes everything in,” said Russo. “It takes some work to get there, but the benefit is that you get one source of truth and there’s no longer finger pointing; it’s all in one area.”





The other aspect to consider is the lead handover process. According to Southworth, internal teams operate in tight silos — marketing puts out compelling content, and once the content is acted upon, it gets sent directly to sales. The current system is too vague, he continued, as marketing teams should be identifying what aspects of the account make it attractive and where they are in the buying journey.

“There’s a challenge in the way that companies are thinking about their funnel and lead handover strategies,” said Southworth. “Often, an account will engage with digital properties, such as filling out a form, which sends the form to the sales team. That’s it; that’s the handover process. Marketers need hand over buying signals to the sales team, such as when an account started researching the organization.”

ABM has grown into a strategy that utilizes personalization, increased internal communication and the implementation of intent signals to determine which accounts are likely to buy, as well identify where those target accounts are in their sales funnel. Rather than taking a shot in the dark and hoping sales teams are hitting the correct accounts, ABM streamlines the approach to produce better ROI and stronger results.

Throughout 2021 and beyond, the companies that see the most success are the ones who take care when implementing or enhancing their ABM strategies. Whether it’s through increased use of intent data, more personalization, blending old and new initiatives or targeting key accounts, ABM will continue to bring teams together and play a key role in success.

“What’s core to ABM is having a single thread of data that you’re pulling together across the whole funnel,” said Southworth. “This thread must be integrated and enriched to enable activation across all internal channels to drive specific objectives.”



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Demand Generation  
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What's Working In  
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2020 ABM Benchmark  
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*Demand Gen Report* is a targeted online publication that uncovers the strategies and solutions that help companies better align their sales and marketing organizations, and ultimately, drive growth. A key component of the publication's editorial coverage focuses on the sales and marketing automation tools that enable companies to better measure and manage their multi-channel demand generation efforts.

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