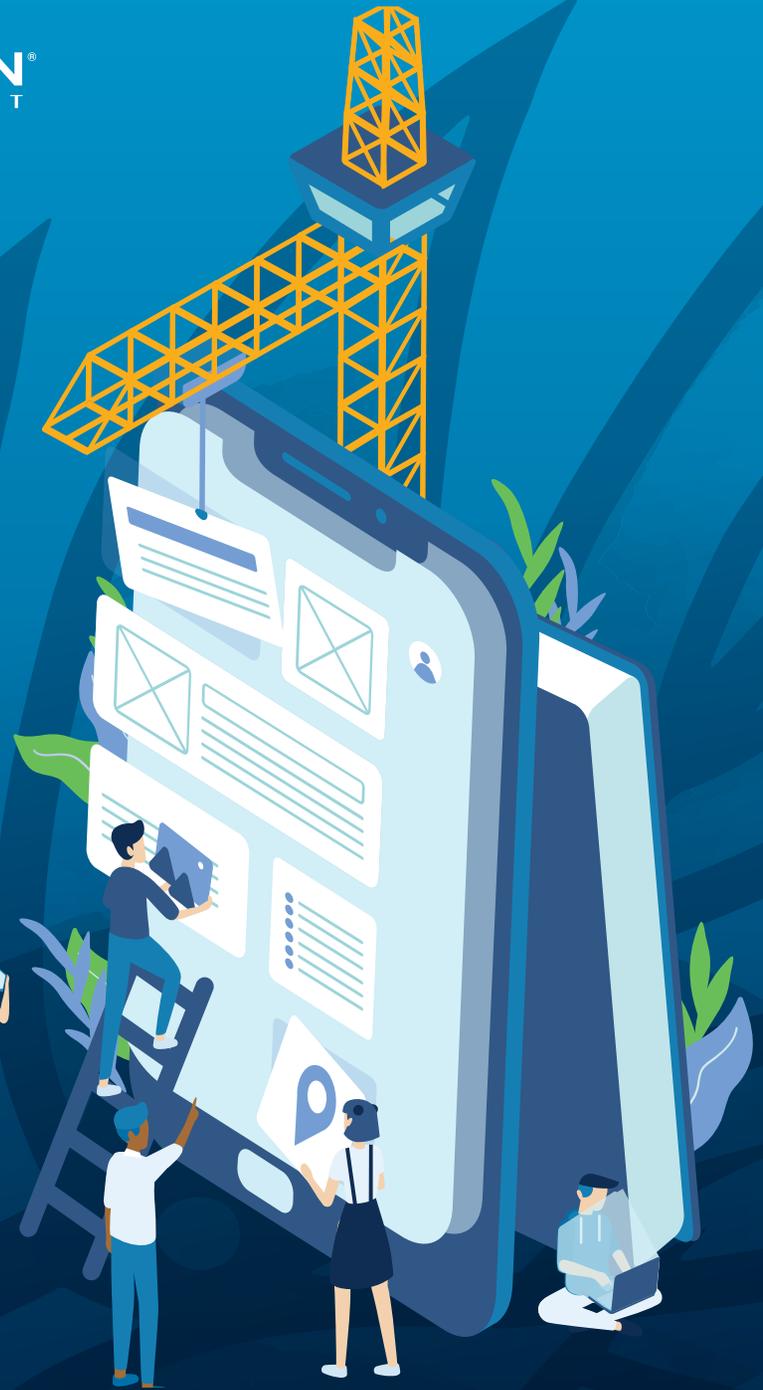




THE 90-DAY ROADMAP
TO FULL-FUNNEL ABM:

An Actionable Guide to Building Out a Multichannel Marketing Strategy in a Single Quarter



In the year 2020, COVID and virtual work environments spurred a big rush to ABM. Compared to 23% in 2019, [Terminus' State of ABM Report](#) found that only 5.8% of teams today do not have an active ABM program. That means an overwhelming 94% have one in place or are planning an ABM strategy. Of those, 8% were in an experimental pilot phase and 43% rated their experience with ABM as "early." It's clear that ABM is a proven revenue strategy and the majority of teams are moving this direction, yet many marketers are searching for a good starting point and action plan.

In this E-book, we will follow a new CMO's journey as she quickly transforms the outdated approach of relying on old-school lead generation programs that don't perform in today's world.

We will provide prescriptive insights from ABM veterans and offer specific guidance to build a more targeted approach for the right audience and then apply an integrated strategy across multiple channels and business functions to engage target buyers.



Specific sections of the E-book will explore:

- How she will utilize data and intelligence to make sure the company is targeting and reaching the right audiences, looking at total addressable market (TAM) and their ideal customer profile (ICP), among other attributes, to determine tight segments of similar accounts.
- How her team will take an orchestrated approach to engage those key accounts and buying groups across a variety of channels.
- How she will reach and influence that audience with targeted advertising to build brand recognition and next steps in the early stages of the journey.
- How her team will build plays that use an integrated mix of chat, email, web and social channels to create experiences that engage those accounts and buying teams to start and continue a conversation throughout their journey.
- How she and her team will align campaigns and content across every stage of their buyers' journey to accelerate sales and increase customer retention and expansion.
- How the company will measure and track the results from different channels and apply the insights gathered from those reports into future go-to-market motions.

With each stage, we will offer specific timeline suggestions to show how far along she should be at critical periods along the 90-day process.

The E-book will also show the positive results she will see by the end of the journey, illustrated through use cases and benchmarks, with specific examples including:

- Higher response rates to emails and outreach;
- Higher engagement rates across all accounts;
- Increased “conversations” with key buyers within each top account;
- Increases in qualified sales opportunities;
- Increases in deal velocity and/or pipeline generated; and
- Higher win rates.

This E-book will use the example of a new CMO at a high-tech company with some experience in account-based marketing. She is looking to establish smarter, more efficient and targeted marketing in this day of shrinking budgets and high expectations from buyers. This E-book will provide a framework for putting ABM into action and aligning all teams around common revenue goals.



Month 1

OVERVIEW:

During this kickoff stage, determine the audience segments that provide the most value for your business and have the highest revenue potential. At this point, you are not going to be able to build robust campaigns and programs for every persona or industry. It's time to focus on the most valuable segments and targets.

In the early phase of an ABM program, experts said it is vital to ensure a strong data foundation to track metrics. If you can't tie ABM back to success — better, more profitable sales opportunities that progress through the funnel faster — the project will not provide the expected returns.

"ABM is not just identifying accounts and then having marketing develop a campaign," said James Gilbert, Head of Marketing at [CRMNEXT](#), a global CRM solution provider in financial services. "It has to be an integrated, data-driven approach to be able to track results."

CMOs need to have conversations with sales, marketing, customer success and other stakeholders to ensure widespread adoption. "Sales needs to understand how ABM is going to fast track the sales cycle and make it better," Gilbert said.

In a recent panel at the [B2B Sales & Marketing Exchange](#), Meagen Eisenberg, CMO of [TripActions](#), said collaboration is key to ABM success. "You're building your targets together; you're building your scoring together and you're building the exact persona you're targeting."

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Sales needs to understand how ABM is going to fast track the sales cycle and make it better.

JAMES GILBERT,
Head of Marketing, CRMNEXT

Next, make sure you've got the resources to set you up for success. In the same panel session, Terminus CEO Tim Kopp noted that companies are making significant investments to get ABM programs off the ground. "Those who are early on in their ABM programs are dedicating about 30% of their budget and 30% of their headcount to ABM."

With budgets set, now is the time to get your A-team in place, according to Darryl Prail, Chief Revenue Officer at [VanillaSoft](#), a sales engagement platform provider. "Your key team players are going to be from marketing, sales and revenue operations."

Once you've had those conversations with stakeholders and have your team in place, dig in to understand your ideal customer profile (ICP). Prail offered two tips:



1. Don't focus on every vertical at once.

"Start with a few to get your feet wet so you can fine-tune your strategy as you move along."



2. Don't overwhelm your team with too many accounts per ICP.

"We started with 500 accounts per ICP," he said. "You'll need to determine what number works best for you."



Month 1

Weeks 1-2: BUILDING OUT SEGMENTS

PLAN:

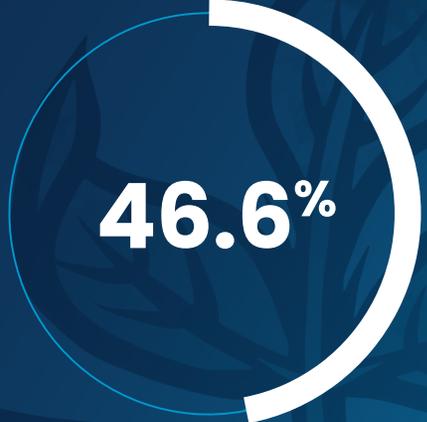
Meet with the sales leaders and teams to outline the strategy. As target accounts begin to click on ads and visit the website, they will generate signals to the sales team. The sales team needs to know how to take those signals and do something with them. There should be integration between the CRM and the ad, marketing and sales automation tools. Consider targeting 100 to 200 accounts in a segment in your targeted advertising, for example.

CHANNELS:

As a starting point, experts suggest starting off with one to four channels for your ABM plays. In fact, research from Gartner cited in Terminus' 2020 State of ABM report indicated that 46.6% of marketers leverage one to four channels for their ABM programs. Companies that use eight or more channels achieved an 18.3% lift in ABM pipeline versus the 9.7% lift from using only four or fewer. If you want additional lift in your pipeline, consider adding more channels like email signatures or LinkedIn Sponsored Content, the report noted.

Targeted advertising — one of the most ubiquitous ways of getting your message in front of the right people — is a good start.

Don't discount direct mail, even in the early stages, Gilbert said. "It is quick to execute and provides a powerful connection with the audience."



46.6%

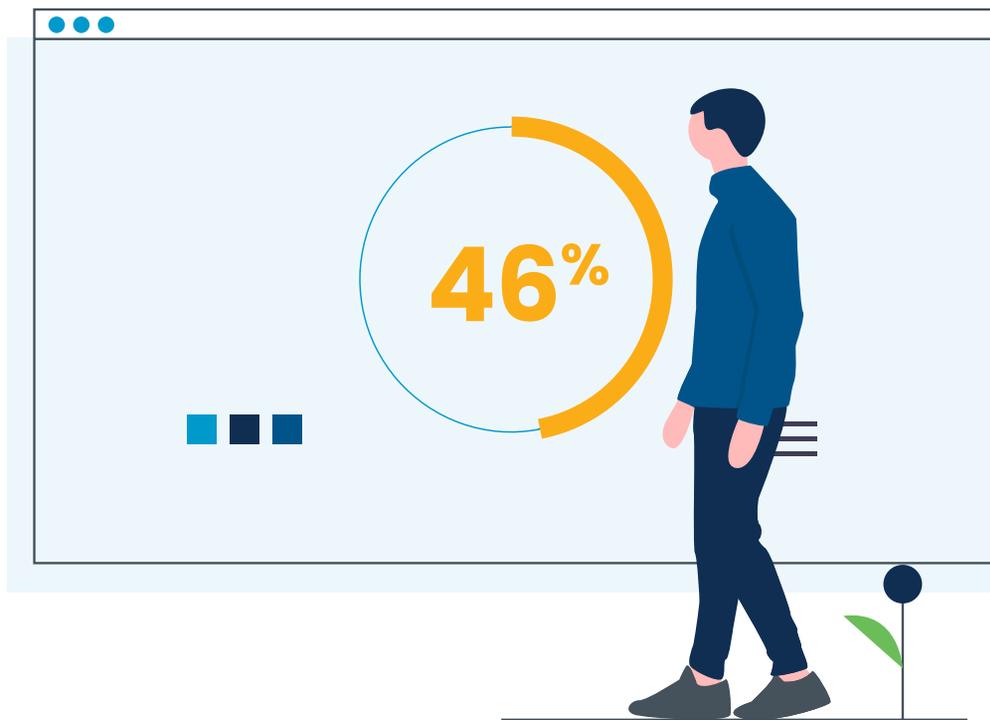
of marketers
leverage **one to
four channels**
for their ABM
programs.

METRICS:

Track the number of target accounts engaged. If, for example, the sales team was able to engage with 25 out of 200 accounts, that provides a baseline as ABM operations scale up.

KEEP TABS ON YOUR METRICS:

If you can't measure it, you can't manage it. Start by understanding the current metrics such as deal size, velocity and close rates. "Then, you can start monitoring these metrics to gain insight into how your ABM strategy is impacting your activity," said Prail.



According to Terminus research, **46%** of early-stage respondents reported that a big challenge was measuring and reporting on account-based results.



Month 1

Weeks 3-4: ADD SEGMENTS

PLAN:

Add several audience segments based on the first month of results. The expansion could include adding new personas, verticals or companies of different sizes based on the initial ABM outreach outcome. Target customers up for renewal.

CHANNELS:

Switch up the creative of the ads that you are currently running and launch new ad campaigns. Also, consider adding a few new channels, such as LinkedIn advertising, email signature banners and retargeting.

Now is the time to employ multiple types of targeting. IP targeting specializes in company-level targeting and cookie targeting specializes in department-level outreach. Out-of-office targeting — important with so many people working remotely — and email expands your reach to the most popular communication channel in B2B.

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Virtual events
and webinars
are very effective
channels
for building
engagement with
accounts and
personas

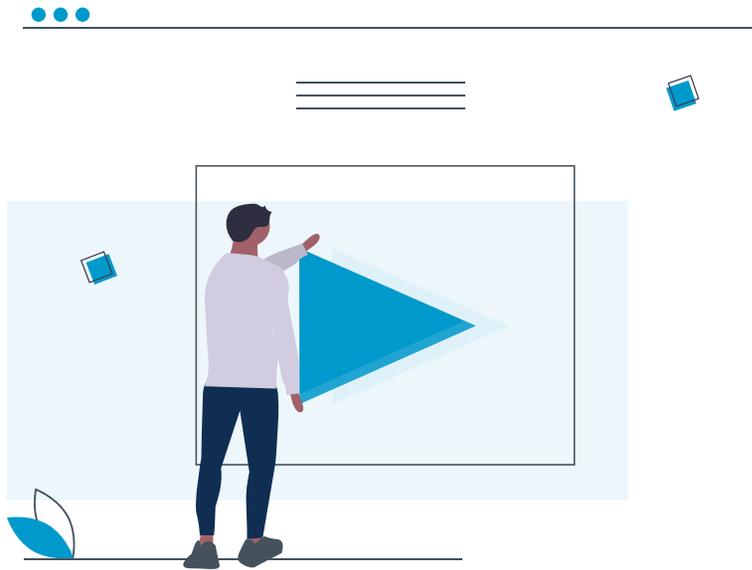
JAMES GILBERT,
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Chat is also an option many successful ABM programs are adding early in the cycle. Buyers want personalized experiences at scale and an easy way to engage with your company that provides an instant response.

Webinars can be a quick, effective and budget-friendly channel to develop the first 30 days. The CMO can tap into SMEs in the various industries or job functions being targeted to create focused webcasts. "Virtual events and webinars are very effective channels for building engagement with accounts and personas," Gilbert said.

METRICS:

Leverage your already existing engagement metrics with account-based advertising while setting up signals for your new channels. Start to leverage other intent signals such as relationship scores and G2 activity.



Month 2

OVERVIEW:

By this time, you've got multiple teams involved, so you want to make sure everyone is communicating and identifying where you need to make changes to your process. "Make it a priority to have open channels of communication for your team to discuss what's happening. Set up a Slack channel, recurring 'gut check' meetings, or a living document," said Prail.

The most critical piece here is refining the segmentation of the account list and ensuring that communication, copy and creative teams are all on the same page.

It's also time to review reporting. Prail stressed that communication is key and staying on top of the reporting needs to be part of your strategy. "Sales and revenue operations need to continuously provide feedback on segments that are generating the most impact so you can make refinements."



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DARRYL PRAILL,
Chief Revenue Officer,
VanillaSoft



Month 2

Weeks 5–6:

PLAN:

Now, multiple accounts through multiple channels are showing mild engagement. At this point, the sales team needs to prioritize outreach, but it's up to marketing to ensure sales has all the information they need to do so (who to contact, what to say, what content to provide). It's important to show your sales team the whole picture. This includes pulling every single touchpoint together so your sales team can understand everything you did to drive engagement. Then, it's time to implement an account scoring framework.

CHANNELS:

Continue with targeted advertising, retargeting, LinkedIn advertising, email signature banners and chat. If you haven't already added any of these channels, consider doing so. If one channel is outperforming another, allocate more budget towards that specific channel.

METRICS:

Examine the number of people who visited your five most valuable web pages. Other important indicators: The number of people who responded to emails and the number of people who engaged with chat. Of the accounts that did engage, measure their level of engagement. Were those who engaged on the buying committee? Determine which target accounts are in the different stages of your sales funnel and measure how fast or slow they have progressed from one stage to another.

If one channel is outperforming another, allocate more budget towards that specific channel.

Month 2

Weeks 7–8:

PLAN:

Focus on pipeline acceleration and customer retention efforts. For targeted accounts that are already engaged and are still showing interest, develop new plays to engage with even more stakeholders within each account. Build a new audience segment of customers coming up for renewal and/or at risk of leaving. Similar to how marketing has worked with sales up to this point, activate the customer success team on signals of engagement. This includes (but is not limited to) relationship scores, ad clicks, banner clicks and intent signals.

CHANNELS:

This is the time to step up your email interactions. This channel is most effective when ABM teams can assign specific email signature banners to their target audiences. The sales and marketing teams can leverage something they were already doing — sending email to their most important audiences — as a strategic channel for their ABM program.

Targeted advertising, website personalization and chat are also key channels during this stage. Use targeting rules with email banners and web personalization to get relevant messages in front of the right customers as they interact with your team and brand. This can include new product updates, offerings, services or other points of value.

METRICS:

Number of engaged accounts, number of accounts in each sales stage, pipeline generated, opportunities created. For current customers, average contract value, relationship score and overall engagement.

Similar to how marketing has worked with sales up to this point, activate the customer success team on signals of engagement.

Month 3

OVERVIEW:

This isn't the time to take your foot off the gas. By month three, you need the entire revenue team to get in the ABM full-funnel swing. "This means fully engaging customer success, product marketing and support," Prail advised. At this point, depending on the typical sales cycle, some deals could be coming into focus.

"If we do our job, reps are going to close," said Eisenberg. "Not only are they going to close deals faster, because we've shortened the sales cycle with them, but their win rates are going to go up because we're giving them the materials they need to win."



Win rates are going to go up because we're giving them the materials they need to win

MEAGEN EISENBERG

CMO, TripActions



Month 3

Weeks 9–10:

PLAN:

Continue to evaluate what's working and what's not working. Pour more resources and budget into what is working well and driving conversions. Start to focus on any deals or customer contracts that are close to being finalized. Start tracking new metrics like won revenue, opportunities won or lost and customer renewals won or lost.

CHANNELS:

Your channels should be set at this point. It is a matter of tweaking the approach. "The most critical piece here is refining the segmentation of the account list and making sure that communication, copy and creative are all on the same page," Prail noted.

METRICS:

Metrics such as won revenue, opportunities won or lost and customer renewals won or lost should be at the top of the list at this point. Continue to closely monitor other metrics such as engaged accounts, new opportunities created and money spent so far. This will provide a foundation for measuring return on investment.

"Your goal is to influence customer retention and customer expansion," Prail said. "Naturally, you would like to include a new set of metrics such as renewal rate growth, net promoter score and average contract value."

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The most critical piece here is refining the segmentation of the account list and making sure that communication, copy and creative are all on the same page

DARRYL PRAILL,
Chief Revenue Officer,
VanillaSoft

Month 3

Weeks 11-12:

PLAN:

As you continue to evaluate success at an account level, you also start to determine which audience segments, channels and content/messaging have performed the best. As you enter the final weeks of the quarter, support the sales and customer success teams with late-stage deals. Focus the majority of remaining resources or budgets on “plays” that might help get deals across the finish line. Direct mail sends and content focused on customer success or competitive advantages are perfect for this.

CHANNELS:

By now, there aren't any new channels to consider that you haven't already tried or used. At this point, it's best to pay close attention to which channel is most effective at reaching your targeted audience. In some cases, it could be multiple channels. If there is messaging or a piece of content that drives urgency for those close to signing a deal, use your most effective channels to get it in front of the intended audience.

METRICS:

Total revenue won, new accounts won, current customer accounts renewed/won or lost, pipeline generated, opportunities created, total engaged accounts and campaign attribution.

If there is messaging or a piece of content that drives urgency for those close to signing a deal, use your most effective channels to get it in front of the intended audience.

QUARTER REVIEW

METRICS TO REVIEW:

Total revenue won, new accounts won, current customer accounts renewed/won or lost, pipeline generated, opportunities created, total engaged accounts, campaign attribution, budget spent and ROI analysis.

PLAN GOING FORWARD:

Determine what worked best in terms of audience segments, channels and tactical plays that drove conversions. Strategize how you can replicate or scale for next quarter. In ROI analysis, also determine what drove the most value and drop what didn't. Think of new data points or criteria to try for the next audience segments or expand upon existing audience segments. Keep all key KPIs on hand so you have a baseline and can compare it with the next quarter.

ABM's impact reaches far beyond the first quarter, noted Julie A. Steven, Group Director of Growth Strategy at [Intelligent Demand](#), in [Terminus' State of ABM](#) report. "In a targeted B2B marketing campaign over the course of 18 months, we executed a multichannel integrated campaign that influenced \$45.5M in year-one value recurring revenue and an 11% closed-won conversion rate." In a recent campaign, the company also saw a 366% increase in engaged accounts.



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INTELLIGENT DEMAND,
Terminus' State of ABM Report



Conclusion

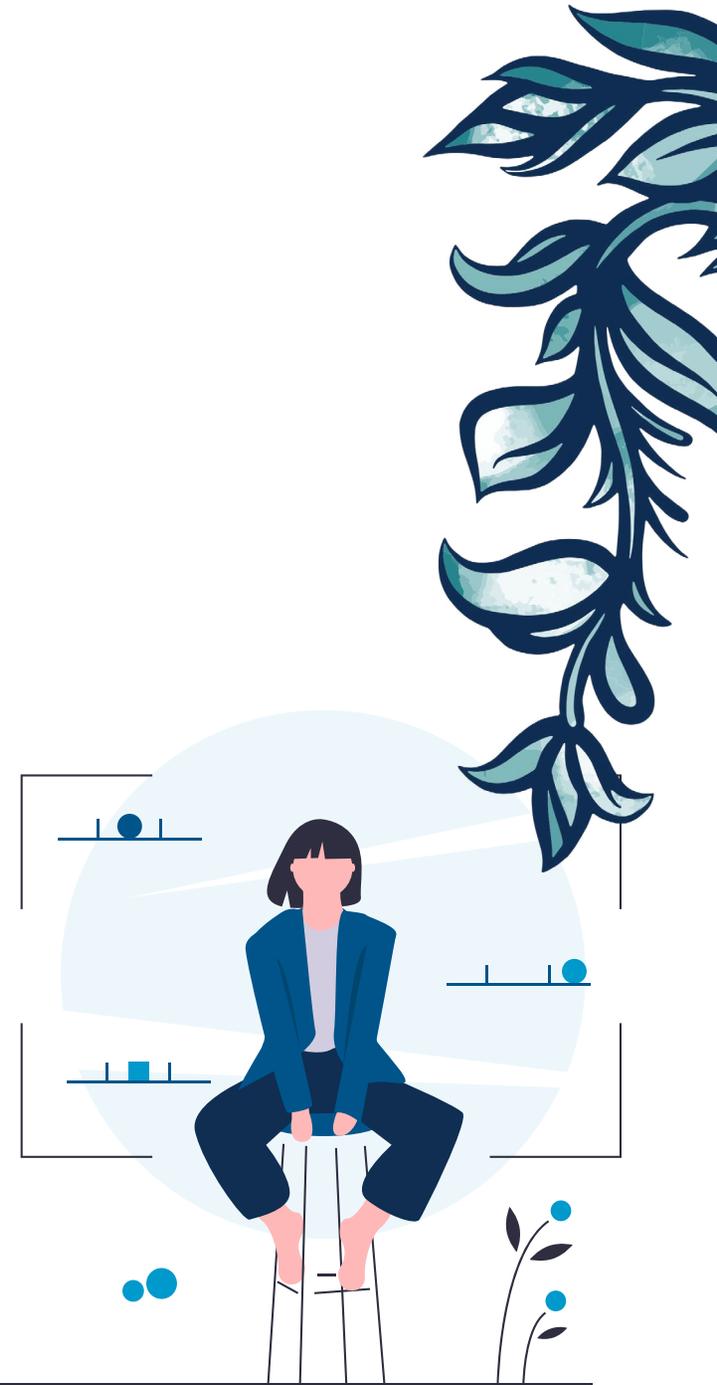
As a recently hired CMO looking to make your mark, you have a unique opportunity to shape how your new organization approaches ABM. It is a chance to get a new program off the ground that demonstrates value throughout the organization.

The first month is all about determining the right target companies and personas by leveraging data points and conversations with stakeholders in key functions such as sales and customer success.

By the second month, you're using metrics to further refine your messaging and audience and building on the channels that are achieving results.

As you hit the final month of the 90-day rollout, your program is hitting on all cylinders and you're starting to see an impact on conversions and deals.

With a thoughtful implementation, you've laid the groundwork for future success. Your sales team is seeing deals close. The customer success team is reporting happier customers and a reduction in churn. The C-suite is seeing an impact on the bottom line and committing more resources to ABM going forward.





Terminus is the leader of the account-based movement and the crucial link that connects B2B marketing and sales teams with their ideal customers. The Terminus solution arms marketing teams with an account-centric platform that delivers the intelligence and automation needed to scale ABM and revolutionize the way B2B marketing is done. Hundreds of organizations worldwide, including Salesforce, GE, Verizon, 3M and CA Technologies, turn to Terminus to more effectively target, engage and grow their best-fit accounts. Terminus offers savvy marketers the technology and proven expertise to radically improve ABM strategies and campaigns, increasing ROI and producing exceptional results. For more information, visit Terminus.com.

888.373.9406

INFO@TERMINUS.COM



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201.257.8528

INFO@DEMANDGENREPORT.COM

