BLUEPRINT

to Account-Based Marketing Campaigns

How to Turn Your Dream Accounts into Customers

Terminus
Account-Based Marketing

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INTRODUCTION

If you could turn any company into a superfan of your brand, what company would you choose? What if you could create a list of "dream accounts," turn them all into customers, and build a symbiotic business relationship with each of them?

Account-based marketing can't *quite* do that for you, but it can help you get pretty darn close.

In the *Blueprint to Account-Based Marketing Campaigns*, we will explore the steps B2B companies can take to drive more revenue from best-fit accounts using account-based strategies.

Whether you're brand new to account-based marketing and want to pilot an ABM strategy or you've been doing ABM since before it had a name, this e-book will help you run a successful campaign that spans Marketing, Sales, and beyond. It will provide you the tools you need to:

- Build your core ABM team
- Select the best account-based tools and technology for your business
- Set goals for your account-based marketing program
- Pick an approach to ABM that fits your needs, goals, and resources
- Create a strategic, results-oriented ABM campaign for demand generation, pipeline velocity, or customer marketing
- Engage your dream accounts with relevant messaging
- Orchestrate account-based plays among Sales, Marketing, and Customer Success
- Measure the success of your campaigns
- Optimize your ABM program using agile principles

But first, let's take a peek at an account-based marketing campaign we're currently running here at Terminus. We call it **Terminus 500**.

WHAT IS THE TERMINUS 500 CAMPAIGN?

We've been doing account-based marketing since Day 1 here at Terminus — after all, we are an ABM tech company — but the Terminus 500 campaign, which we kicked off at the beginning of 2017, was a new frontier for our team.

Sure, we had run plenty of ABM campaigns before with goals like driving event attendance, winning more business from current customer accounts, and generating demand among a small list of named accounts. We *hadn't*, however, run a large-scale Programmatic ABM campaign that spanned so many channels, tactics, and key players. (If you don't know what Programmatic ABM is, that's okay! We'll explain more on page 15.)

We'll go over all the nitty gritty campaign details in **Part Five** of this blueprint, but here's the gist.

Our Sales and Marketing teams worked together to **identify** our 500 dream accounts. We then **expanded** our reach to all the key decision-makers at those accounts and "warmed them up" with account-based ads. Next, we orchestrated ABM plays to **engage** them and generate demand within those accounts.

The goal? Turn our top 500 dream accounts into active sales opportunities.

We piloted this campaign in Q1 of 2017, and while it was successful, not everything went as planned. We faced obstacles and made some mistakes, but above all, we learned.

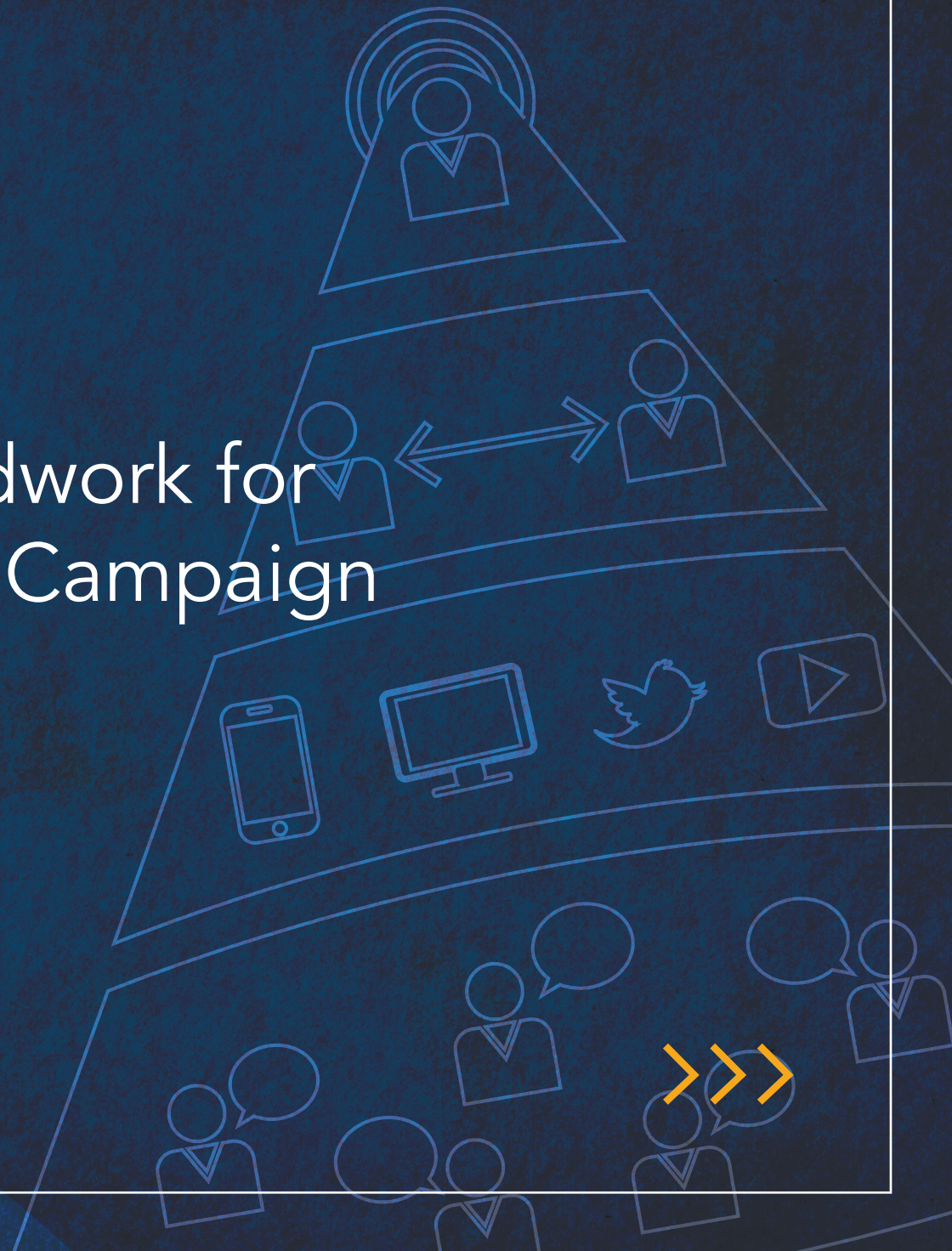
Now we're on our second iteration of the Terminus 500 campaign. We've implemented additional strategies, restructured parts of our sales process, and created new content to support the campaign. This time around, we're seeing better results even faster.

This e-book is a *Blueprint to Account-Based Marketing Campaigns*, but the great thing about modern marketing is that your campaigns aren't monuments erected in stone and brick. You don't have to build a castle; instead, build a series of ever-improving structures that reflect the lessons you learn as you go along.

Let's start building.

PART ONE

Laying the Groundwork for a Successful ABM Campaign



Before you start planning your first account-based marketing campaign, you've got to lay a solid foundation for ABM. The building blocks to a successful account-based marketing program are:

- A tightly aligned ABM team
- Clearly defined reasons for doing ABM
- An understanding of the four types of ABM
- Budget for technology, events, media, and/or direct mail
- A cohesive marketing technology stack
- A prioritized list of dream accounts

BUILD YOUR CORE ABM TEAM

First things first: you need to assemble your core account-based marketing team.

"But I already have a marketing team!" you may be thinking.

That's true, but your account-based marketing team expands outside of just Marketing. The members of your ABM team will vary depending on organizational needs, but at minimum, it should be made up of team leads from Sales and Marketing. In an ideal world, you want to bring together these roles:

- **Demand Generation & Field Marketing** to help design and execute ABM campaigns
- **Marketing & Sales Operations** to help identify accounts, ensure that campaigns are executed correctly and the right data is available, and report on results
- **Content Marketers & Designers** to create personalized content, resources, landing pages, and so on
- **Account Executives & Sales Development Reps** to execute 1:1 engagement. They're out there on the front lines fighting for your brand
- **Marketing & Sales** to advocate for ABM throughout your organization

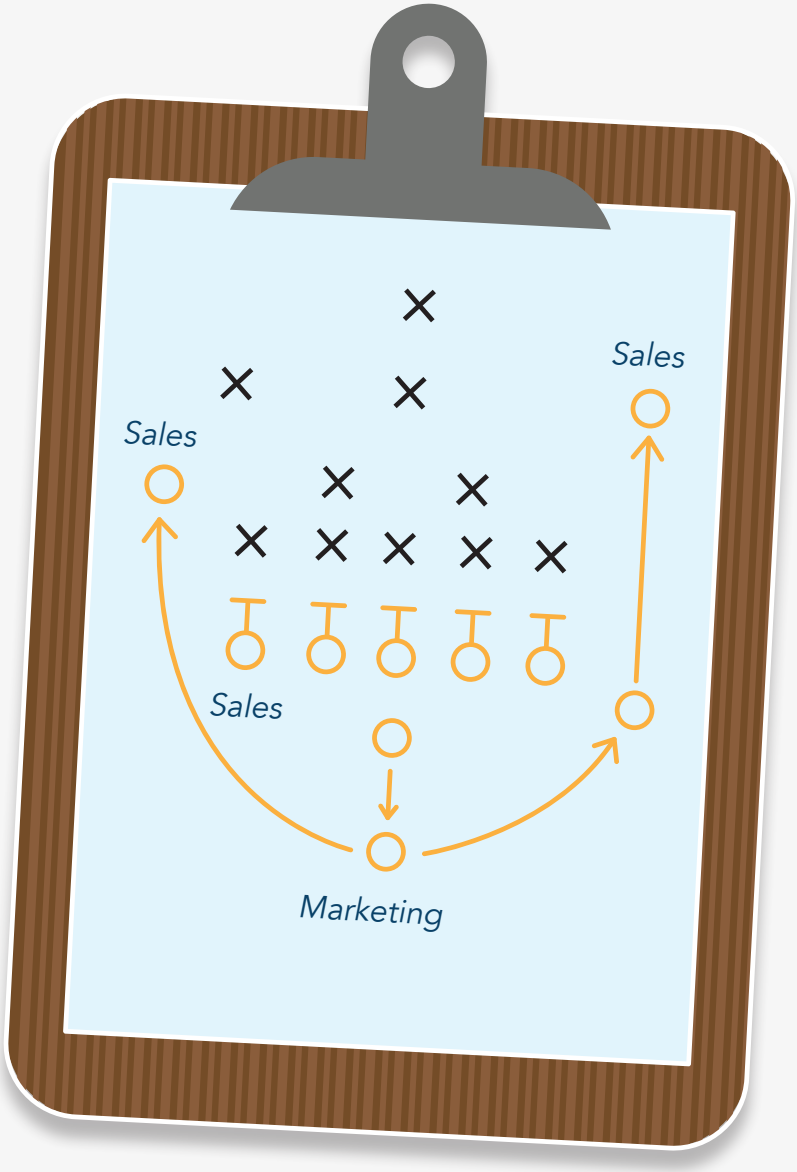
BUILD YOUR CORE ABM TEAM

Marketing's role is to be the quarterback on the team, calling plays and cueing the other players. Sales is responsible for executing those plays to advance the ball closer to scoring the goal.

Prior to launching — or even planning — your first account-based marketing campaign, your ABM team should work together to set expectations, define success, and determine the role ABM will play at your organization. Everyone on the team should be able to articulate why ABM is important, what success will look like and how it will be measured, and their individual role on the team.

The team leads will need to evangelize ABM within your company. While this sounds easy, it can be hard to do well. The team will be working through the inevitable challenges and setbacks that come with implementing any new strategy and process, and it's important to be conscious of how you share information to internal stakeholders, such as SDRs, account executives, or leadership.

Above all, the ABM team is responsible for defining how you will make account-based marketing successful — and that starts with determining the approach you'll take to ABM.



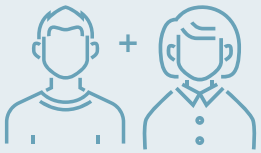
BUILD YOUR CORE ABM TEAM

REAL-WORLD EXAMPLE: The Terminus Account-Based Marketing Dream Team

At Terminus, we're always experimenting with ways to do ABM better. In late 2016, we restructured our marketing team to reflect our account-based approach to business. Now, one marketing team member is dedicated as a resource for every other department's function head. By giving the marketing team internal clients, we're ensuring each of our marketing functions supports part of the organization that's driving revenue.

Director of Account-Based Marketing + Director of Sales Development

To support our SDRs in their outreach activities, our Director of Account-Based Marketing and her team are helping to align our marketing technology, going beyond calls and emails to engage prospects. Our SDRs are producing personalized videos, using social media, and testing new channels to generate interest and awareness among target accounts.



Director of Product Marketing + VP of Sales

To support our team of account executives, our Director of Product Marketing project manages major sales initiatives, such as creating sales collateral and other sales enablement activities. He is responsible for creating new pitch decks, launching programs like the ABM Stack Grader, and developing marketing partnerships with the vendors in the Terminus Cloud for ABM.

Customer Marketing Manager + Director of Customer Success

Account-based marketing goes beyond the typical B2B buyer's journey to create an awesome customer experience. This means marketing needs to dedicate resources for clients, not just prospects and opportunities. Our Customer Marketing Manager supplies the Customer Success team with new marketing collateral, such as how-to content for product adoption, customer testimonial videos, and monthly customer webinars.

To take this a step further, we also hired a Chief Revenue Officer who is working to oversee the Sales and Customer Success departments. By thinking about revenue in terms of existing clients while also working to bring on new accounts, we can align the organization to create an an exceptional customer experience.

SET GOALS

Your ABM goals and strategy need to align with the strategic goals of your business. Broadly speaking, there are three reasons to do account-based marketing.

Demand Generation
Generate demand from accounts that are most likely to turn into customers, creating more qualified pipeline for Sales

Pipeline Velocity
Shorten the time spent in each stage of the sales process and turn accounts into customers faster

Customer Marketing
Increase revenue, decrease churn, and build lasting relationships with your clients

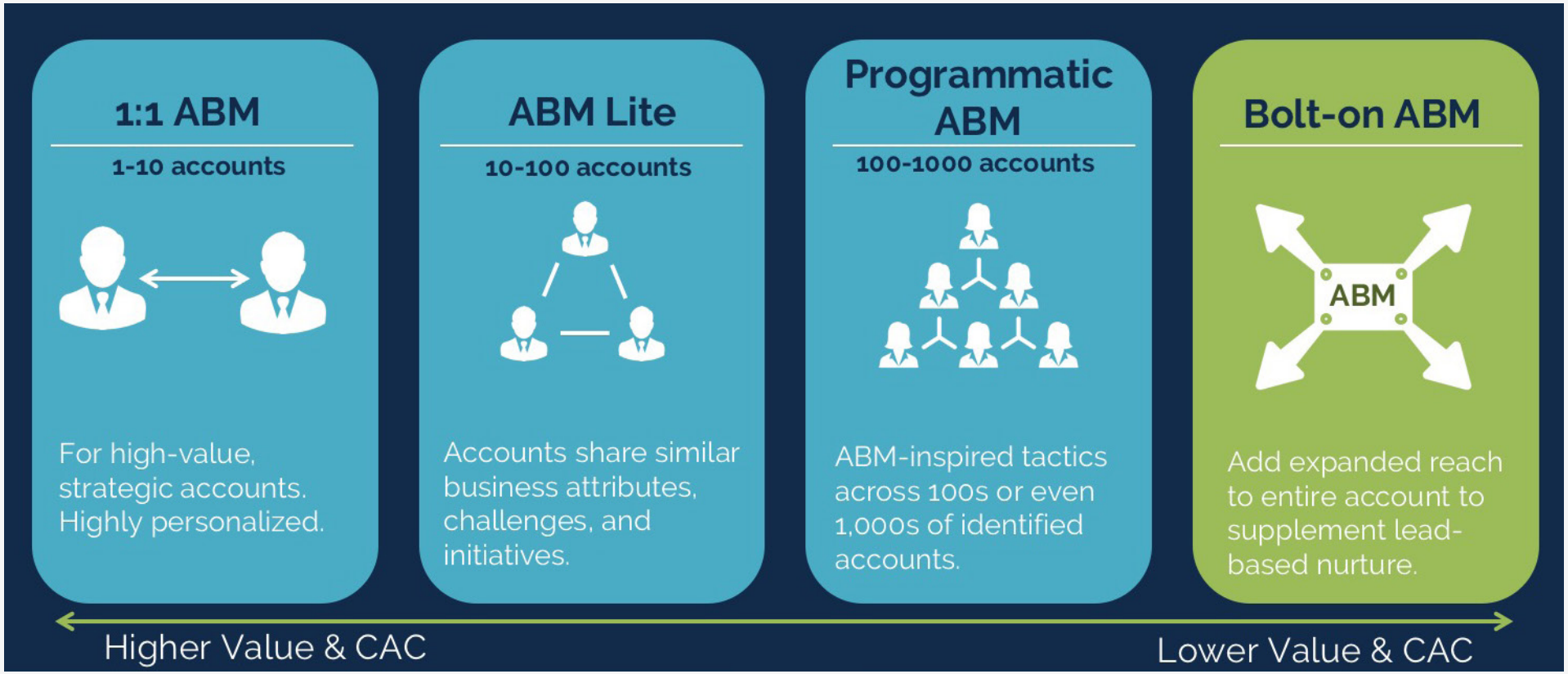
What are your biggest priorities as a business? Are you focused on generating demand for your solution? Do you have plenty of great-fit accounts in your pipeline, but you find that you often hit roadblocks during a long sales cycle? Or maybe you have a strong customer base but you face a problem with churn.

We find that most of our customers start their ABM journeys with the goal of generating demand and filling their sales pipelines with best-fit accounts. Once they start to see results, they generally add a focus on pipeline velocity and shortening the sales cycle. Others, however, have jumped right into customer marketing, launching cross-sell or upsell campaigns during a product release. The most important thing to remember is that your reason for doing ABM should align with the goals of your business as a whole.

THE 4 TYPES OF ACCOUNT-BASED MARKETING

Next, your core ABM team needs to understand the four different ways to approach ABM. The tactical approach (or approaches) you take depends on the number of accounts you plan to target.

The four types of ABM are:



THE 4 TYPES OF ACCOUNT-BASED MARKETING

1:1 ABM

Audience size: 1-10 accounts
Deal size: Larger than average deals; usually enterprise accounts
Sales process: Long, complex sales cycles that involve multiple decision-makers across different departments
Personalization: Highly personalized content, experiences, and offers specific to the accounts and even individuals within the accounts
Scalability: Low

1:1 ABM (also called a *strategic account or named account strategy*) is the traditional "Mad Men" approach to winning business, in which an ABM team is focused on a strategically selected handful of high-value accounts — usually between one and ten at a time — that warrant a highly personalized approach to ABM.

Although this is the most well-known ABM strategy, marketers who are assigned to these strategic accounts often make the mistake of only using a small selection of channels to reach their buyers. Usually it's an over-reliance on in-person events — often a generic experience like a steak dinner. To really make an impact on your target accounts, though, you need to broaden your approach and consider digital ads, personalized content and digital experiences, and compelling direct mail to complement events and sales outreach.

Remember: alignment and research are critical. Marketers should have just as deep an understanding of these accounts as the AEs who are working them.

One of the most common objections to ABM stems from the misunderstanding that all ABM is 1:1, only targeting a few select accounts and requiring extensive time and resources. Don't forget, **ABM does scale.** As we'll explore, 1:1 is only one of four tactical approaches to ABM. The three other types of ABM we'll cover in this e-book are much more scalable.

THE 4 TYPES OF ACCOUNT-BASED MARKETING

ABM Lite

Audience size: 10-100 accounts
Deal size: Larger than average deals; usually enterprise or mid-market accounts
Sales process: Long, complex sales cycles that involve multiple decision-makers across different departments
Personalization: Strategic personalization, including adapting content, experiences, and offers to fit target accounts' needs
Scalability: Medium

As first defined by ITSMA[1], ABM Lite is a one-to-few approach in which ABM teams target a selection of accounts that share similar business challenges, needs, and firmographics.

Accounts in an ABM Lite program need to have a large enough opportunity size to warrant more spend and resources than the typical deal, but not large enough to justify a 1:1 approach. A common approach is to develop an ABM strategy focused on shared pain points among accounts and personas within those accounts. This is complemented by strategic personalization, such as adapting content to fit their needs, running targeted account-based digital ads, and using website personalization.

ABM Lite campaigns are a great way to do agile account-based marketing and see what works before you scale your ABM program. Do this by demonstrating how this type of campaign can be replicated and repeated on a larger scale as you begin to see positive results. ABM Lite is a great way to approach a new segment, find success with a smaller list, and prove out ABM as an effective marketing strategy so you can scale it to a more programmatic approach.

1. Bev Burgess, '**Defining the Three Types of Account-Based Marketing**' (ITSMA 2017).

THE 4 TYPES OF ACCOUNT-BASED MARKETING

Programmatic ABM

Audience size: 100-1,000 accounts
Deal size: Average value deals
Sales process: Sales cycles that involve multiple decision-makers
Personalization: Automated personalization early in the sales cycle and highly personalized sales conversations in later stages
Scalability: High

With the right technology in place, Programmatic ABM is a highly scalable approach to marketing and sales that justifies focused targeting and personalization.

Programmatic ABM involves targeting lists of 100 to 1,000 accounts that share common traits and business challenges. Traditional lead-based marketing, on the other hand, is about using mass marketing techniques and channels to drive as many leads into the funnel as possible with no real way to filter out unqualified leads until they're already in your database.

These lead generation activities result in a lot of noise in the top of the funnel, wasted time and money, and a lack of collaboration between Sales and Marketing. It's the reason less than 1% of leads become revenue, according to Forrester Research.

Programmatic ABM, enabled by marketing technology, allows marketers to scale to reach a large group of target accounts efficiently and effectively. It results in better win rates, larger deal sizes, more opportunity creation, and ongoing revenue growth from current customers.

We sometimes see marketers who believe they are doing account-based marketing but are really just continuing to "spray and pray" because they're targeting a large list that has no meaningful segmentation. It's best to keep target lists smaller and your campaign planning, execution, and review cycles shorter. This agile approach to ABM will increase your likelihood of success. If you're taking a programmatic approach, we recommend starting with account lists no larger than 500 accounts, and preferably closer to 100 to 250.

THE 4 TYPES OF ACCOUNT-BASED MARKETING

Bolt-On ABM

Audience size: Any
Deal size: Any
Sales process: Sales cycles that involve multiple decision-makers
Personalization: Highly personalized sales conversations in later stages of the buyer's journey
Scalability: High

A huge challenge with lead-based marketing is that it violates a basic truth of B2B marketing: you're selling to an organization, not an individual. In the majority of B2B sales, marketers need to engage the entire buying committee, but lead-based marketing relies on one or two individual contacts to communicate your message to the rest of the company. This leaves little room for you to control the narrative and speak directly to each person, addressing their individual needs.

Bolt-On ABM solves this basic problem by allowing marketers to engage the rest of the buying committee while still marketing to one specific lead. Here's how it works: a lead comes in via inbound efforts and is then qualified, routed, and worked by sales or placed in a nurture campaign. A Bolt-On ABM strategy uses technology to trigger actions that engage other personas from that particular company when the lead comes in and as it progresses through the funnel.

Technology like Terminus allows marketers to automate Bolt-On ABM with digital advertising, even without requiring contact data for those other people in the account. As the lead moves through the marketing and sales funnel, their colleagues also receive targeted communications from your company, so when the time comes to have a sales conversation, the entire buying committee is familiar with your solution.

Bolt-On ABM improves opportunity creation rates and overall account engagement, but you should not expect the same results as you get from the other, more robust approaches to ABM. Often, Bolt-On is a good first step for an organization that is generating a lot of leads and is seeing success with their lead-based program, but they want to slowly shift to ABM. Note that Bolt-On ABM is also limited to demand generation and is not a fit for pipeline velocity or customer marketing campaigns.

BUDGET FOR ABM

Okay, sounds great — but isn't account-based marketing expensive? **It doesn't have to be.**

For the most part, ABM spend goes toward four main categories.

- **Technology** – If you want your ABM program to be scalable, there's no way around it. Account-based marketing requires investing in new tools and technology.
- **Media** – Thanks to its targeted nature, account-based advertising is much more effective than "spray and pray" tactics. By focusing on target accounts, your ad dollars will go a lot further with ABM than with a lead-based program.
- **Events & Experiences** – You're probably already hosting or sponsoring events, webinars, and dinners for high-value prospects. ABM simply puts more focus on getting the right people to those events, effectively improving your ROI.
- **Direct Mail** – This classic marketing tactic is making a comeback in a big way. Whether you choose to send handwritten notes from your executive team to your best customers or high-value gifts to your hottest prospects, chances are direct mail will play some part in your ABM program.

The amount you spend on each category depends on your audience, the type of ABM you're doing, and your level of commitment to ABM. If you're just starting out with an ABM Lite pilot program targeting 50 handpicked accounts, you may choose to invest in account-based advertising, a few in-person events, and inexpensive but highly personalized direct mail.

If you're doing Programmatic ABM, your organizational changes may be mostly structural with some additional investments in marketing technology. If you're currently buying lead lists or spending money on programmatic advertising for lead generation, you should funnel that money into your ABM efforts instead.

Finally, some Marketing teams choose to reallocate budget previously spent on an agency to new ABM technology that allows them to accomplish the same tasks with an ABM approach. If you currently work with an agency on your digital advertising strategy, for example, you may find that it's cheaper (and even simpler) to leverage ad tech like Terminus and run campaigns in-house with strategic support from our Customer Success Managers and behind-the-scenes ad optimization done by our Advertising Operations team.

BUILD YOUR ABM TECH STACK

After your core ABM team has agreed on your audience size and your reasons for doing ABM, it's time to invest in technology that will help you reach your goals.

A robust account-based marketing technology stack has tools from each stage of the #FlipMyFunnel model for ABM:

- **Identify** best-fit accounts
- **Expand** reach to the right people in those accounts
- **Engage** accounts with highly targeted content, offers, and outreach on the right channels
- **Advocate** turns customers and prospects into raving fans
- **Measure** the results that matter for your business

BUILD YOUR ABM TECH STACK

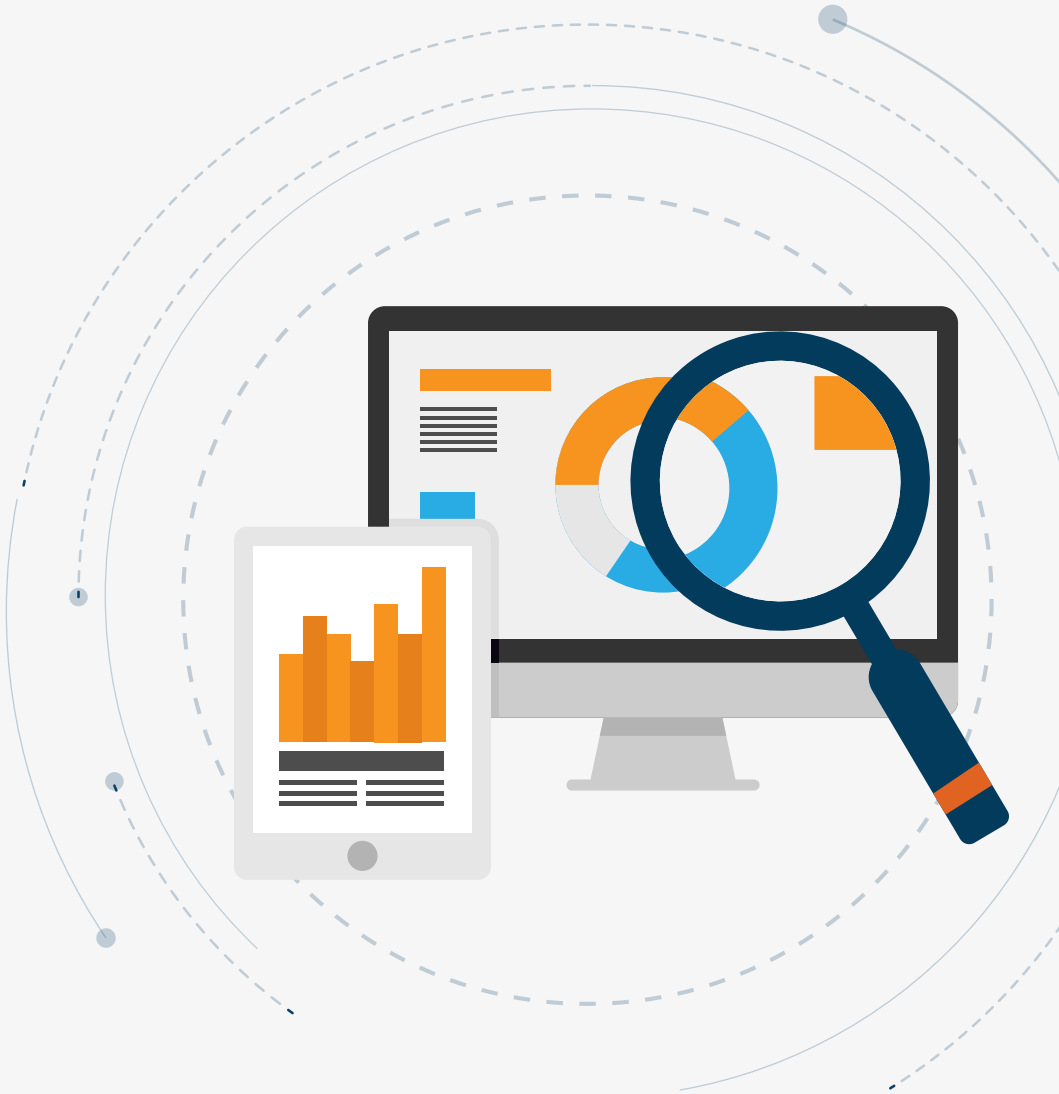
Identify Technology

Technology in the Identify stage of the #FlipMyFunnel model for ABM helps you find and select your list of dream accounts. Identify software falls into two categories: data and predictive.

Data technology helps you identify accounts based on firmographics and other attributes. For example, you could search for accounts with 1,000-2,500 employees, in the IT industry, that are using HubSpot's marketing automation tool. Data technology may also provide insight into the accounts, contact data, and other enhancements.

Predictive software uses data science to help select and prioritize accounts. These tools have a variety of methodologies and provide a solution for determining the following:

- **Fit** – Is the account a good fit for your solution?
- **Intent** – Is the account in-market for your solution? This is determined using a variety of buying signals from across the web.
- **Deep Attributes** – Predictive can give you insight into attributes that are difficult to find in traditional data providers — for example, if you're a digital marketing agency, you may need to know how much each account spends on online advertising.



BUILD YOUR ABM TECH STACK

Expand Technology

The software in the Expand stage helps find the right people at target accounts. This technology helps marketers cover an account in a variety of ways by providing:

- Contact data for buyer personas
- Lead-to-account matching and routing to ensure that leads are being associated with the right accounts in your database
- Insight into the account profile
- Expanded reach to more decision-makers and influencers at target accounts, even without the contact data being in your CRM

While many of the tools in the Identify stage also provide value for the Expand stage, such as predictive scoring on contacts or selling contact records, many marketers leverage existing technology in their stack, such as their CRM, to ensure that they have the best account profile.

BUILD YOUR ABM TECH STACK

Engage Technology

The software in the Engage stage includes all of the technology you need to scale your outreach to the decision-makers at target accounts. The main categories are:

- Marketing automation & email
- CRM
- Event & webinar
- Content
- Digital ads
- Personalization
- Direct mail

You probably already have tools that can be repurposed for your ABM efforts, such as your CRM, marketing automation platform, webinar platform, and content marketing technology. Your marketing automation platform might even offer landing page personalization.

Think about your overall ABM strategy and how engagement technology fit into that strategy. You don't have to go out and purchase tons of new tools. Pick and choose tools based on your strategy, not the other way around, and you'll have what you need to drive measurable results.

"

When I started with SOASTA about a year ago, we were basically a Salesforce and Marketo shop. I had some search marketing happening in the background, and we were doing retargeting, but I had to ask myself, 'What's the one thing I want to add to my tech stack this year?' I've only added one thing to my tech stack this year, and it's Terminus.

- JENNY COUPE, VP of Customer Acquisition, SOASTA

BUILD YOUR ABM TECH STACK

Advocate Technology

For many B2B teams, the majority of marketing resources are spent generating demand and accelerating deals through the sales process. This is a very effective focus for marketers using ABM, but what are you doing once that deal crosses the finish line?

Advocate tools help you continue to foster relationships with your customers and turn them into loyal ambassadors for your business. There's no more effective form of marketing than word of mouth.

> 84% of B2B businesses begin the buying process with a referral.[2]

> 83% of customers are willing to refer a solution they're satisfied with.[3]

There are several different types of Advocate technologies that allow you to engage with customers across their entire journey, including onboarding, adoption, upsell/cross-sell, retention, referral, and expansion. It's also important to give your customers a voice, which is where review sites such as G2 Crowd come into play.

While Advocacy is an oft-overlooked stage of the #FlipMyFunnel model for ABM, investing in the customer experience and focusing resources to ensure that your customers are happy will lead to more engaged customers that become raving fans of your product or service not only within their company, but also externally in the market.

2. Edelman Trust Barometer (2013).
3. Deena Katz, Sandra Huston, and Shaun Pfeiffer, "Economics of Loyalty" (Texas Tech University 2010).

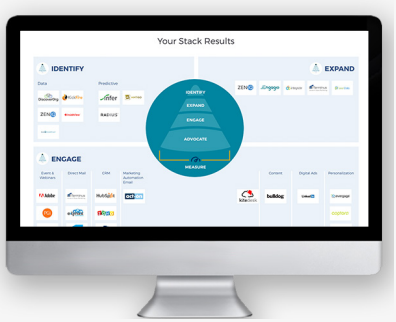
BUILD YOUR ABM TECH STACK

Measure Technology

The Measure stage is critical for showing the impact of your ABM program. You don't necessarily need to invest in an ABM specific measurement tool. Try combining tools you already have such as your CRM, Google Analytics, results from engagement tools, or even an Excel spreadsheet (if necessary) to measure the success of your account-based marketing campaigns.

Resources for Selecting ABM Technology

Terminus Cloud for ABM



Terminus Cloud for ABM – 40+ best-in-class ABM technology providers that integrate with Salesforce to build the perfect account-based marketing tech stack for your business

ABM Stack Grader – An interactive tool to help you build a comprehensive ABM tech stack and identify gaps and overlap in your current toolset

BUILD YOUR ABM TECH STACK

REAL-WORLD EXAMPLE

PGi [COLLABORATIVE ADVANTAGE]

Company: PGi
Product: Web Conferencing & Collaboration Solutions
Approach to ABM: Programmatic
ABM Expert: Cheryl Hanley, Senior Director of Demand Generation

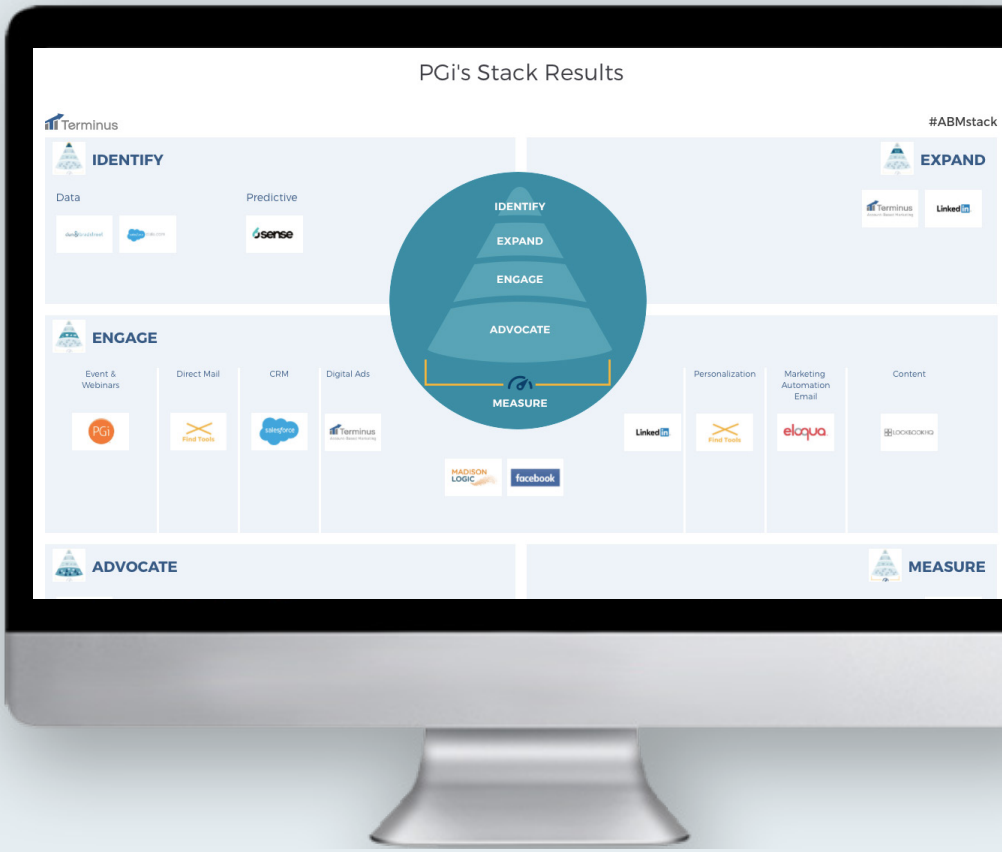
"It can be challenging to move to a new marketing strategy — but without the right tools, it's impossible. Ensuring you have the right tools at the right stage of your ABM maturity is critical," says Cheryl Hanley, Senior Director of Demand Generation at PGi.

"A little over a year ago, we were your typical, straight-up lead gen focused team. We were not being as targeted with our efforts, and we realized we needed to get focused on accounts that mattered most to our sales team.

"That's when we made the shift to ABM.

"We created our first target lists to feed one channel: North American field sales. We found firms that fit our firmographic profile and made sure they were in our Salesforce CRM. From that first list, we began engaging. Since then, we've become much more sophisticated with our programs and the ABM technology that supports them."

Read on to learn how PGi leverages the key tools in their account-based marketing technology stack.



BUILD YOUR ABM TECH STACK

REAL-WORLD EXAMPLE

PGi [COLLABORATIVE ADVANTAGE]

MADISON LOGIC

We started with **Madison Logic** for syndicating content against our ABM list. They would provide us with leads that met a specific profile fit against our list of prospect and customer accounts. We started with a relatively broad focus: marketing products across our portfolio and looking for opportunities to expand within our installed base.

Terminus
Account-Based Marketing

Terminus allows us to quickly spin up a targeted digital ad campaign at any stage of our marketing and sales funnel. We know that it's reaching the key decision-makers and influencers — regardless of whether we have their contact information — with the right message. We primarily use it as an acceleration tool targeting accounts in various stages of opportunity. It's very efficient with spend, too. We're also building Terminus advertising campaigns around events and webinars, both before and after, which has been awesome.

iMeetLive by PGi

For webinars at PGi, we leverage our own technology, **iMeetLive**. We have found that attendees to our webinars tend to be further along in their buying cycle, making webinars a great tool to help generate pipeline. With iMeetLive we can gain valuable insights on attendee engagement, save time thanks to its integrations with Eloqua and Salesforce, and easily edit and publish recorded webinars.

6sense

6Sense provides us with predictive intelligence on which companies are actively looking for web conferencing. It scores our entire Salesforce instance. This lets us determine which accounts to focus on, and it provides insight into our customer base. A "hot" account buying stage on an existing customer could raise a red flag that we need to go into retention mode, or it may signal that the account is a candidate for upsell or cross-sell. 6Sense predictive intelligence allows us to prioritize our marketing and sales efforts to the right accounts, saving time and money.

influitive

Influitive is a great platform that helps us stay connected to our customer base to drive utilization and adoption of our collaboration tools and solutions. We also use it to solicit testimonials and case studies, which help build credibility among prospective customers.

bizible

Bizible helps us understand the value and contribution to pipeline that each marketing touchpoint has. It has been helpful with understanding the impact of our ABM efforts and creating a framework for measurement.

IDENTIFY YOUR DREAM ACCOUNTS

Now you have everything you need to identify your dream accounts — the companies you'd like to turn into customers. Your dream accounts can also be *dream-come-true* accounts — in other words, they may be current clients. You've already done what it takes to win their business, and you want to prioritize keeping them as customers and growing your business relationships.

IDENTIFY YOUR DREAM ACCOUNTS

Defining Your Ideal Customer Profile

All your dream accounts should fit your **ideal customer profile**, or ICP. An ideal customer profile is a description of the company — not the individual buyer or end user — that's a perfect fit for your solution.

Your ICP should focus on relevant characteristics of your target accounts, such as:

- Industry/vertical
- Employee headcount — companywide and within key departments
- Annual revenue
- Budget
- Geography
- Technology they use
- Makeup of their customer base
- Level of organizational or technological maturity

Use the **Ideal Customer Profile Worksheet** on page 110 to get to know your company's ideal customer and define your ICP. For the best results, don't fill it out on your own! Schedule a time to have your Marketing, Sales, and Customer Success teams sit down and go through the worksheet together so everyone is on the same page about your ideal customer profile.

TIPS FOR IDENTIFYING YOUR DREAM ACCOUNTS

Mine your database. Your CRM and marketing automation platform are full of undiscovered insights! Leverage the data you already have at your fingertips to find prospects, opportunities, and current customers that offer the best revenue potential.

Look at your competitors' customers. You can automate this process using tools like iDatalabs or HG Data, or you can do manual research using LinkedIn, review sites, and other online communities.

...and your customers' competitors. Business insights platforms like Owler can give you a great overview of any business, including a list of their top competitors. Take a look at your best customer accounts' profiles, and mine their list of competitors for accounts that fit your ICP. Then, you can reach out to these competitors to highlight benefits of your solution that they are missing out on.

Set up job alerts. If you sell to an emerging category, keep an eye out for potential new business by subscribing to job alerts using your buyer personas' titles and other keywords. That way, you'll know when a company is likely to be in-market for your solution.

Leverage your ABM tech stack. Use any of the **identification tools in the Terminus Cloud for ABM** to discover accounts that match your ICP. You can also use predictive tools to determine which accounts are in-market and when they're likely to make a purchase.

IDENTIFY YOUR DREAM ACCOUNTS

Tier Your Dream Accounts

Tiering your list of dream accounts allows you to prioritize your audience based on the campaign you're running. Chances are, you won't engage all of your target accounts in the same campaign. In fact, you *shouldn't* because it can overwhelm your sales reps, water down your messaging, and funnel too many resources to the wrong accounts.

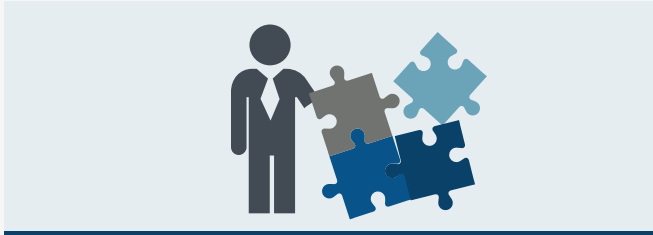
The solution? Account tiering.

Account tiering refers to using technology, data points, and good old-fashioned research to prioritize your dream accounts. Most B2B companies find that a 3-tiered system works best. In this system:

- Tier 1 accounts are perfect ICP fit, similar to your highest value customers. Tier 1 also includes logos with strategic value.
- Tier 2 accounts are strong ICP fits but have a lower lifetime value.
- Tier 3 accounts fit most, but not all, ICP criteria. They're worth pursuing, but typically not worth investing significant resources to win their business.

TIER 1

TIER 2



TIER 3

IDENTIFY YOUR DREAM ACCOUNTS

REAL-WORLD EXAMPLE

Company: Invoca
Product: Call Intelligence Platform
Approach to ABM: Programmatic
ABM Expert: Julia Stead, Director of Demand Generation

Selecting Invoca's Dream Accounts

"We started off using a combination of different tools that allow you to come up with great lists of accounts based on different filters like company size, industry, all kinds of different data points," Julia explains.

In addition to firmographic data, the Invoca team layered on other data points that matter to their business, such as:

- How much is each account spending on paid search?
- How much web traffic versus mobile traffic does each account get?

Tools Invoca used to identify their dream accounts include:

Datanyze
SimilarWeb
LinkedIn
InsideView
EVERSTRING

IDENTIFY YOUR DREAM ACCOUNTS

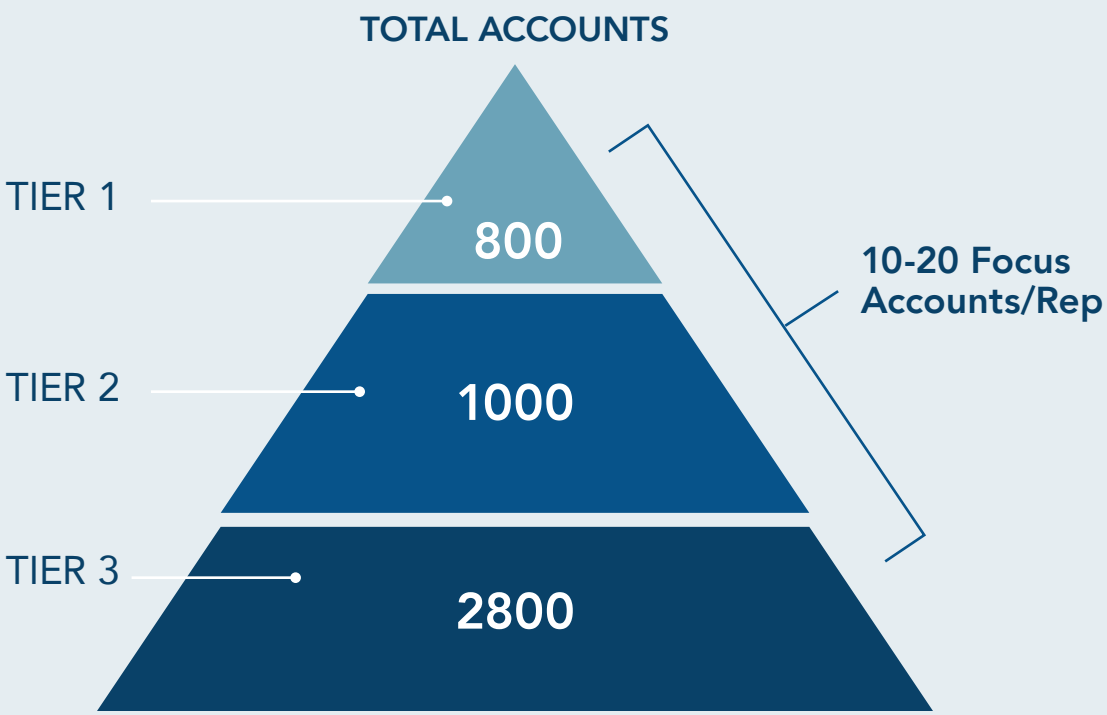
REAL-WORLD EXAMPLE

INVOCA®
The power of talk

Tiering Their Master List

Technology was instrumental in identifying Invoca's dream accounts, but prioritizing them required some manual work.

"Given the nature of our business," Julia shares, "we felt that a human touch was needed to really identify our top tier of accounts. Just because they have this technology profile does not necessarily mean they're a good fit for Invoca. A really key piece for us is, do they care about phone calls? Do they have a 1-800 phone number on their website? Do they have a call center? These are all attributes which aren't necessarily available to us through predictive tools and different data filters."



"We had a special ops team that included leadership from Marketing and Sales go through and handpick our Tier 1 accounts. For the rest — our Tier 2 and Tier 3 — we relied on the automated data and bucketed them based on how many of our target attributes the account had. From there, we passed these lists on to our sales reps and had them pick ten or 20 focus accounts.

– JULIA STEAD, SaaS Demand Gen Leader at Invoca

IDENTIFY YOUR DREAM ACCOUNTS

From MQLs to MQAs

With account-based marketing, you need to redefine what "sales-ready" means. Since the advent of marketing automation, sales readiness has been defined by your **marketing qualified leads**. But because B2B companies sell to accounts and not individuals, qualifying a lead is simply not enough.

The activity of one individual in an account does not signify that an account is sales-ready. When a salesperson receives an individual lead from Marketing, there is still a lot of work that needs to be done to engage multiple individuals in the account.

"So many sales professionals would prefer to find and break into their own best-fit accounts than to do the same amount of work to pursue a mediocre marketing MQL," explains Tonni Bennett, VP of Sales at Terminus. "In the end, most MQLs actually require more work from the salesperson."

Instead, you need to shift your focus to MQAs (marketing qualified accounts) instead of MQLs because an MQA requires multiple contacts at an account to be engaged with your brand.

EXAMPLE: At Terminus, a marketing coordinator at one of our best-fit accounts who has low activity on our website would still be of higher value than a VP of Marketing at a low-fit account with a lot of activity. We may engage with both eventually — there can certainly be exceptions to the ICP — but our sales team would prioritize the high-value account.

"You hire an account executive. You never hire a lead executive.

– SANGRAM VAJRE, CMO & Co-Founder at Terminus

PART TWO

Planning Your ABM Campaign

Congratulations! You've laid the groundwork for your ABM campaign. Now is the time to get creative and start designing the campaign itself. To plan an account-based marketing campaign, you need to:

- Understand the different plays you can run with ABM
- Define the audience for your campaign
- Expand your reach within your target accounts
- Decide which channels and tactics you'll use to engage your target audience
- Develop your campaign creative and messaging
- Cue up plays for Marketing, Sales, and/or Customer Success

MAP OUT YOUR ABM PLAYS

Let's take a look at some common plays you can run with account-based marketing. Many of these plays can be orchestrated as a standalone campaign or in conjunction with one or more other plays.

For example, you could use pretargeting to warm up net-new accounts before an event, drive registration with help from Sales, and then employ a pipeline acceleration strategy targeting additional stakeholders at the accounts your team met with at the event.

Get editable worksheets to help you plan campaigns around each of these plays starting on **page 77** of this Blueprint.

Demand Generation Plays

1. **Pretargeting**

Pretargeting is more or less the opposite of retargeting. Instead of serving ads to people who have visited your website, you proactively pretarget your dream accounts with relevant ads. This is a great way to familiarize your target accounts with your solution and messaging before your sales team begins outreach. You can also use pretargeting to warm up accounts before an event.

2. **Account Nurture**

Account nurture plays aim to engage key stakeholders at target accounts that you already have in your database and convert them to sales pipeline. Because the B2B sales cycle is long and often complex, many of the accounts you're marketing to won't be immediately ready to make a purchasing decision. Don't make the mistake of letting these accounts go to waste just because they're not going to turn into immediate sales. Instead, you can use account-based nurturing to continue to present your messaging and content to those accounts over time, keeping your company top-of-mind until they're ready to convert into a sales opportunity.

3. **Lead-to-Account Nurture**

Lead-to-account nurtures are only applicable to a Bolt-On ABM program. (See page 15 for more on this.) This play allows you to funnel leads (usually inbound or event leads) into your database and then expand your reach to nurture their entire buying committee with account-based ads. Just like with an account nurture play, the goal of a lead-to-account nurture is to convert an account to an opportunity.

MAP OUT YOUR ABM PLAYS

Pipeline Velocity Plays

4. **Pipeline Acceleration**
This play focuses on moving accounts currently in your pipeline through the sales process more quickly. You can use account-based marketing tactics to complement the 1:1 conversations your account executives are having with opportunities.

5. **Wake the Dead**
"Waking the dead" refers to reengaging cold opportunities to build sales pipeline with accounts that are most likely to close.

REAL-WORLD EXAMPLE: SOASTA Shortens Their Sales Cycle by 40% with ABM

Company: SOASTA, recently acquired by Akamai Technologies
Product: Website Performance Analytics Solutions
Approach to ABM: Programmatic
ABM Expert: Jenny Coupe, VP of Customer Acquisition

Before SOASTA got started with account-based marketing and the Terminus platform, their average sales cycle for a digitally sourced deal was 95 days.

Using pipeline acceleration ABM plays, they've shortened the time from click to close by 40%. **Now, their average sales cycle is just 57 days.**

How? While SOASTA's Sales team is busy engaging their dream accounts, Marketing is working behind the scenes to figure out what kind of ads enable Sales to close deals more quickly.

"The beauty with Terminus," says Jenny Coupe, VP of Customer Acquisition, "is you can set up . . . different custom campaigns. I was able to A/B test a lot of different things, find that sweet spot, and then double down there."

Jenny explains, "We haven't had good reach historically around marketing to marketing functions and C-level functions. We're noticing that by [leveraging] Terminus for that reach, we're seeing faster acceleration with our opportunity stages."

Using Terminus to expand their reach within their dream accounts has been a game changer because it's allowed them to minimize the friction that comes with a large buying committee.

"We've increased our reach and what I call 'shots on goal,'" Jenny shares, "and that's just accelerating the whole process."

The result? A shorter sales cycle, a happy Sales team, and more closed-won revenue.

MAP OUT YOUR ABM PLAYS

Customer Marketing Plays

6. **Upsell/Cross-Sell**

The goal of upsell and cross-sell campaigns is to increase the average contract value of your current customer base. This play requires close collaboration between your Marketing, Sales, and Customer Success teams.

7. **Increased Adoption**

Many SaaS companies run into problems when their end-user or point of contact switches roles or leaves the company. To combat this, you can orchestrate account-based customer marketing plays to increase adoption at your customer accounts, making your solution indispensable so you don't have to resell your value when it comes time for renewal.

8. **Land & Expand**

Selling to enterprise accounts can be tricky, especially when they're divided into smaller divisions or subsidiaries that operate independently and often have different points of contact. This is where you'll want to "land and expand." If you've done business with one division of a complex enterprise company and are hoping to expand into others, you can use ABM technology like Terminus to present digital ads to those target divisions' key decision-makers. These ads are especially effective when they're hyper-personalized, highlighting case studies and testimonials from your target buyers' coworkers. As you expand your relationship with different departments or divisions within an enterprise company, you will evolve from being just another vendor to being an invaluable partner that's embedded in the DNA of their business.

9. **Customer Advocacy**

Use account-based tactics to turn your top-tier customers into advocates for your brand by giving them an excellent customer experience, asking for (and actually listening to) their feedback, and providing them with opportunities to highlight their businesses. In return, you can leverage these successful clients for case studies, speaking engagements, testimonials, and referrals.

MAP OUT YOUR ABM PLAYS

Other Strategic Plays

10. **Drive Event Attendance**

You can use account-based tactics to drive event attendance from target accounts. This versatile play spans demand generation, pipeline velocity, and customer marketing and is most often used in conjunction with other ABM plays.

11. **Product Launch**

If you're launching a new product or service, a product launch play is a great way to get the word out. Whether the product is geared towards prospects or current customers, using ABM for the launch is perfect for reaching your dream accounts with the specific messaging and benefits that matter to them.

12. **Competitive Takeout**

With all the technology and data available to B2B marketers, information on which companies are working with your competitors is readily available. With this type of ABM play, you can target accounts that are using or evaluating a competitor and highlight a problem your solution can solve that your competitor's can't.

REAL-WORLD EXAMPLE: Driving Event Attendance with Account-Based Marketing

In 2016, Terminus sponsored a #FlipMyFunnel conference in Boston. As sponsors, our goal was to get our dream accounts in the Northeast to the event. Because the conference coincided with #FlipMyFunnel's first birthday, we took that theme and ran with it in our event marketing.

First, we selected **375 net-new target accounts** that fit our ideal customer profile and were located within a reasonable distance of Boston with the goal of driving as many registrations from the target account list as possible. To do this, we developed a multichannel ABM campaign with a birthday party theme.

All of the marketing assets were based on the idea of getting an invitation to celebrate with Terminus. The campaign included:

- Terminus account-based digital ads
- Direct mail
- Call and email cadences personalized with an invitational video from our sales reps

Results:

Of our 375 dream accounts, **11% attended**. Because these accounts were handpicked, we knew they fit our ICP, so it's no surprise those few best-fit accounts drove more than **36% of the pipeline** we generated from the event.

The way we see it, even if we're not the hosts of an event, it's still up to us to proactively bring our dream accounts to our booth. ABM is about quality over quantity, and this campaign certainly hit the mark.

MAP OUT YOUR ABM PLAYS

Account-Based Marketing Play Matrix

	Demand Generation	Pipeline Velocity	Customer Marketing	Bolt-On ABM	Programmatic ABM	ABM Lite	1:1 ABM
Pretargeting	X				X	X	X
Account Nurture	X				X	X	X
Lead-to-Account Nurture	X			X			
Pipeline Acceleration		X			X	X	X
Wake the Dead		X			X	X	X
Upsell/Cross-Sell			X		X	X	X
Increased Adoption			X		X	X	X
Land & Expand			X		X	X	X
Customer Advocacy			X		X	X	X
Drive Event Attendance	X	X	X		X	X	X
Product Launch	X	X	X		X	X	X
Competitive Takeout	X				X	X	X
← Terminus Campaigns →							

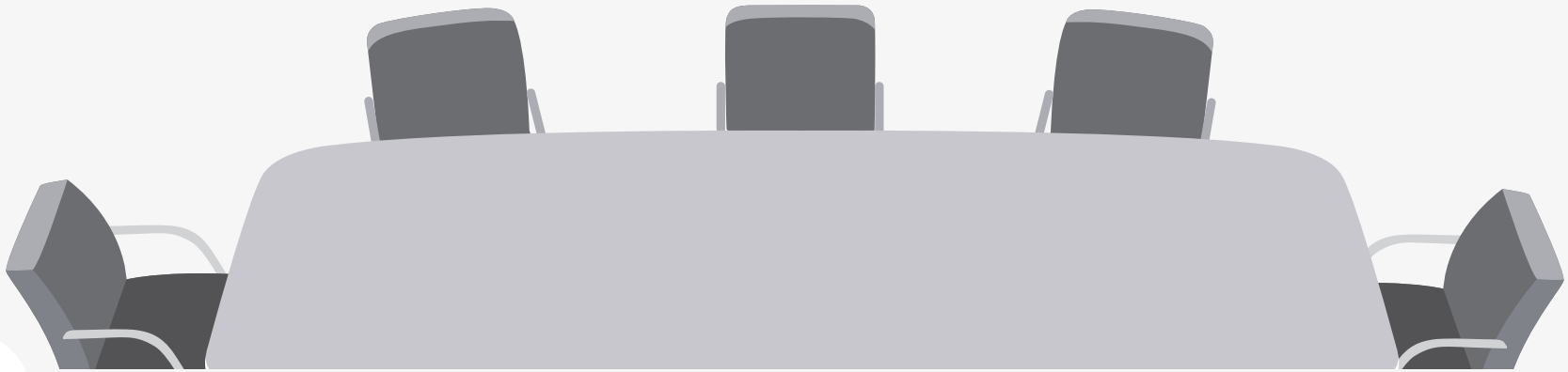
DEFINE YOUR AUDIENCE

You've already got your list of dream accounts, but it's not account-based marketing if you drop them all in one campaign and blast them with the same messaging. This is where you'll need to segment your list of target accounts based on your campaign goals and the plays you'll be running.

If you're doing 1:1 ABM or ABM Lite, you'll need to take your list of dream accounts and whittle it down to the highest-value Tier 1 accounts. With Programmatic ABM, you will need to decide how much personalization each tier of accounts will receive during the campaign. You can also opt to take a hybrid approach to ABM, doing 1:1 ABM for a small segment of Tier 1 accounts and ABM Lite or Programmatic ABM for the rest.

REACH THE ENTIRE BUYING COMMITTEE

At its core, ABM recognizes the need for a holistic marketing strategy that proactively engages every decision-maker at your dream accounts. This requires everyone on your Sales, Marketing, and Customer Success teams to deeply understand your buyer personas.



REACH THE ENTIRE BUYING COMMITTEE

Defining Your Buyer Personas

Buyer personas are overviews of the people you engage with during the sales process. They are used to guide your Sales, Marketing, and Customer Success teams throughout the buyer and customer lifecycle. Think of a buyer persona as a "composite sketch" of your customers.

The **Buyer Personas Worksheet** on page 113 will help you identify your buyer personas for ABM. Remember, because most B2B purchases are made by a buying committee, you should fill out this worksheet for each of your buyer personas.

One important note: *do not* fill out the worksheet based on gut instinct or anecdotes alone. In order to develop rich, accurate buyer personas, you'll need to do a good amount research by digging into your database, conducting interviews with your buyers, and talking to your Sales and Customer Success team members.

TIPS FOR REACHING THE ENTIRE BUYING COMMITTEE

Invest in quality data tools. Explore the tools in the **Terminus Cloud for ABM** that will help you expand your reach to all decision-makers at your dream accounts.

LinkedIn is your friend! LinkedIn should be your go-to resource for manually identifying key contacts at your target accounts.

Check your target accounts' websites. Now more than ever, businesses are highlighting their team members on their websites. Explore your target accounts' websites to see if they list their employees and their roles on a team page. If you're lucky, you might even find information about their org structure.

TACTICS & CHANNELS

When it comes to account-based marketing, not all engagement tactics and channels work for every campaign. The planning worksheets on pages 78-109 offer suggested tactics and channels for each type of play, whether you choose to run them individually or as part of a larger campaign.

Demand Generation: Pretargeting

Demand Generation: Account Nurture

Demand Generation: Lead-to-Account Nurture

Pipeline Velocity: Pipline Acceleration

Pipeline Velocity: Wake-the-Dead

Customer Marketing: Upsell/Cross-Sell

Customer Marketing: Adoption

Customer Marketing: Land and Expand

CRAFT YOUR CAMPAIGN MESSAGING & CONTENT

Account-based marketing is so effective because it allows you to proactively engage your dream accounts rather than waiting for qualified leads to come to you. Which channels will you use to reach those accounts? You can deploy your account-based marketing campaigns using channels and activities such as:

- Email
- Direct mail
- Social media
- Video
- Website
- Blogs
- Display ads
- Search engine ads
- In-person events
- Infographics
- Webinars and virtual events
- E-books and white papers

Account-based advertising tools like Terminus take the guesswork out of ABM campaigns by allowing you to reach your dream accounts (and only your dream accounts) wherever they are online. You should prioritize the other channels based on which have historically been the highest revenue drivers for your business.

Once you've selected your marketing channels, it's time to create targeted content that will resonate with your audience. You may choose to create marketing assets for different buyer personas, verticals, company sizes, deal sizes, or stages of the sales cycle. Or, you can get even more personal by creating 1:1 messaging for each account.

If you're targeting accounts by their stage of the sales cycle, you can use the **Content Mapping Worksheet** to map your existing and future content to each stage of the buyer's and customer's journeys.

TIP: Make sure your marketing and sales messaging is consistent across channels. According to McKinsey & Company, the typical B2B customer uses six different channels throughout the decision-making process, and about 65% say they become frustrated by inconsistent brand experiences.

PLAN SALES/CUSTOMER SUCCESS OUTREACH

After you've nailed down your messaging and content, you need to equip your Sales Development Reps or Customer Success team with everything they need to help make your campaign a success.

This means working with your Sales and/or Customer Success team leads to:

- Create a timeline of Marketing, Sales, and Customer Success touches throughout the campaign
- Plan SDR cadences
- Write voicemail scripts and phone call talk tracks
- Draft email templates
- Coordinate direct mail sends

Creating a campaign orchestration roadmap is the key to keeping your Sales, Marketing, and Customer Success teams on the same page throughout your entire campaign. You will need to develop a clear timeline that lays out every single touchpoint each persona at your dream accounts will have with your company. Use the editable **Campaign Orchestration Planning Template** to map out your campaign.

PART THREE

Engaging Your Dream Accounts

Now it's time to launch your campaign! Unlike with some digital marketing campaigns, you won't just be pressing a button and waiting for the results to roll in. To see real, meaningful results with ABM, you need to cue your team to execute the tactics you planned in Part Two.

Stage of ABM	Key Players
Demand Generation	Marketing + Sales Development
Pipeline Velocity	Marketing + Account Executives
Customer Marketing	Marketing + Customer Success

ABM ORCHESTRATION

ABM orchestration is about delivering the right content, on the right channels, to the right contacts in your target accounts. You'll need to create a shared roadmap for Marketing, Sales, and/or Customer Success and be prepared to make adjustments on the fly.

Historically, Marketing and Sales have operated in silos. Marketing generates an MQL and hands it off to Sales, who is responsible for following up with that individual. Even some organizations that have traditionally focused on accounts still work in silos with an abrupt handoff between the two functions. However, it's just not effective in a market where less than 1% of B2B leads turn into revenue.

As a result, ABM abolishes the handoff. Instead, it's up to you to make sure every member of your ABM team knows exactly what they're responsible for throughout the buyer's journey. In order to keep everything organized, you need to create a shared roadmap.

Creating a Shared Orchestration Roadmap

As we discussed in the previous section of the Blueprint, your Marketing team needs to create an orchestration roadmap for each ABM campaign you run. This roadmap will be a place where anyone in your organization can go to see what type of touches the target accounts are getting at any point throughout the campaign. Usually, this roadmap is a similar to a GANTT chart. The next page provides an example.

REAL-WORLD EXAMPLE: PFL's Campaign Orchestration Roadmap

Company: PFL
Product: Direct Mail & Marketing Technology Solutions
Approaches to ABM: 1:1 ABM, ABM Lite, Programmatic ABM, & Bolt-On ABM
ABM Expert: Daniel Gaugler, CMO at PFL

"A multichannel campaign is key," explains Daniel Gaugler, CMO at PFL. "Too often as marketers, we focus on the channels where we want to engage our customers rather than how they want to experience our brand. That's why it's important to orchestrate ABM campaigns across multiple channels."

But, he emphasizes, that doesn't mean blasting your message across any and every channel you can think of. "It's not about turning up the volume and sending more. It's about improving the quality of your interactions and orchestrating relevant experiences for your target accounts across all channels."

For PFL, the way they orchestrate these experiences is through what they call "four dimensional campaigns," or 4D campaigns, which consist of display advertising, email, tactile marketing, and website personalization.

"We don't exclusively use these channels," explains Daniel, "but at a minimum, whenever we run an account-based marketing campaign, these are our foundational channels. We also use events, in-person meetings, phone calls, and so on."

REAL-WORLD EXAMPLE: PFL's Campaign Orchestration Roadmap

This campaign orchestration roadmap comes from PFL, a direct mail and marketing technology company. Their ABM campaign roadmap visualizes the timeline of the channels they used for their campaign, including:

- Marketing emails
- Webinar
- Direct mail
- Terminus ABM display ads
- Web personalization
- Sales outreach

The roadmap indicates each touchpoint and when they're occurring respective of one another. This is more stylized roadmap without a strict timeline because, Daniel explains, they ABM program is agile, and they're always adding more contacts and accounts to their campaigns.

"When we have a good contact fit at a strategic account, we want to be able to engage with them today. We may get an additional contact tomorrow, and then we'll add them into the campaign," he says. "We also want to be able to adjust our outreach based on things we've learned about our target accounts and events that we know contacts will be at."

When you plan your own campaign orchestration roadmap, you can organize it by date, time between touches, or stage of the buyer's journey. Use the **Campaign Orchestration Planning Template** to get started on your own ABM roadmap.

FUNDAMENTALS OF ACCOUNT-BASED SALES DEVELOPMENT

ABM comes with some very welcome changes for sales development teams. It allows Marketing and Sales to speak the the same language — the language of accounts, not leads — and focus on the same goals. But those benefits also require Sales to trust Marketing, something they may be wary to do if Marketing was previously sending them leads of questionable quality.

Let's take a look at how account-based sales development works and how you can set your SDR/BDR team up for success.

Why Coaching is Key for ABM

Even the most seasoned sales development professionals will need coaching for account-based marketing. There are bound to be some growing pains when you tell someone to fundamentally rethink the way they're doing their job, and ABM does just that.

Our Sales Development team was performing well with a combination of traditional prospecting and account-based sales development. However, we knew switching to an entirely account-first approach to sales development would help fill our pipeline with more qualified accounts who were in-market for our solution.

That's where coaching comes in. Around the time we started the Terminus 500 campaign, former SDR Morgan Ingram was promoted to Sales Development Manager. It's his job to make sure the SDRs are executing the campaign as planned, but simply going through the motions is not enough.

> "You have to be coachable. I didn't know anything about tech when I first got to Terminus, and I definitely didn't know anything about sales development. I couldn't just come in here and think I'm going to absolutely blow it out of the water and I don't need to listen to anyone. I had to learn from people who are clearly in the positions that they have for a reason so that I was able to accelerate my growth as an SDR, personally and professionally, and was able to hit my goals.
>
> – MORGAN INGRAM, Sales Development Manager (& Former SDR) at Terminus

Learn more about crushing your quotas as an SDR in Morgan Ingram's YouTube channel, **The SDR Chronicles**. The SDR Chronicles provides motivation, tactics, and skills for all aspects of your sales development journey.

FUNDAMENTALS OF ACCOUNT-BASED SALES DEVELOPMENT

Morgan focuses on coaching to help each sales development rep improve upon their weak spots and capitalize on their strengths. He also emphasizes the importance of keeping a steady mindset as an SDR. "Don't let your emotions get the best of you because you won't get the results that you want," he explains. Even the best Sales Development Reps have bad weeks, but when you let it get you down, you run the risk of perpetuating that negativity and continuing to underperform. "That's why it's important to have a steady mindset," Morgan says.

According to Morgan, top-performing SDRs are:

- **Consistent.** It's critical to be consistent when reaching out to prospects and following up with them. Sales tools like SalesLoft help with this because they allow SDRs to see which contacts and which accounts require outreach at any given time.

- **Methodical.** Consider having your reps block off time on their calendars to focus on specific tasks. For example, from 2 to 3 p.m. every day, they might focus on adding more contacts to their target accounts. From 3 to 4 p.m., they could work on creating personalized videos.

- **Well-Researched.** SDRs already know the accounts they're engaging fit your ICP, which gives them a basic understanding of the companies right off the bat. However, that information alone is not enough to develop personalized messaging. Excellent SDRs will get to know each target account's org structure, client base, and pain points to make a meaningful connection between your solution and your dream accounts' challenges and priorities.

- **Genuine.** Great SDRs are personable and demonstrate genuine concern about their prospects' concerns and challenges. The way they do this can vary. Some reps are pros at connecting through video while others are awesome at personalizing emails. The bottom line is to encourage your SDRs to let their personalities shine through in their outreach. People want to work with real people — and canned emails with no personality will undoubtedly get sent to the trash.

FUNDAMENTALS OF ACCOUNT-BASED SALES DEVELOPMENT

In addition to sales coaching, consider setting up office hours and other training opportunities for your sales development team. At Terminus, we hold weekly office hours where our SDRs can meet with our Director of Account-Based Marketing, Stephanie Kelly, to pick her brain about ABM and get tactical advice for engaging with target accounts. Depending on your buyer personas, you may want to set up office hours with both a marketer and other employees at your company. For example, if you sell to Human Resources professionals, ask your HR manager to check in with your SDRs once a week and answer any questions they have.

> Sales development is all about personalization, education, awareness, and helping prospects solve their problems with your solution. At office hours, I help SDRs look at target accounts and figure out what their problems are, what they're passionate about, what their businesses do, and who they sell to. Together, we do research to help us understand accounts and individual buyers and pull out relevant information that will help our SDRs personalize the buying experience.
>
> – STEPHANIE KELLY, Director of Account-Based Marketing at Terminus

AIR COVER FROM MARKETING

The best way for Marketing to stay involved throughout the entire buyer's journey is to provide air cover throughout the sales process and the customer lifecycle. As your dream accounts move through the funnel, you can use marketing activities to complement their 1:1 conversations with your sales team.

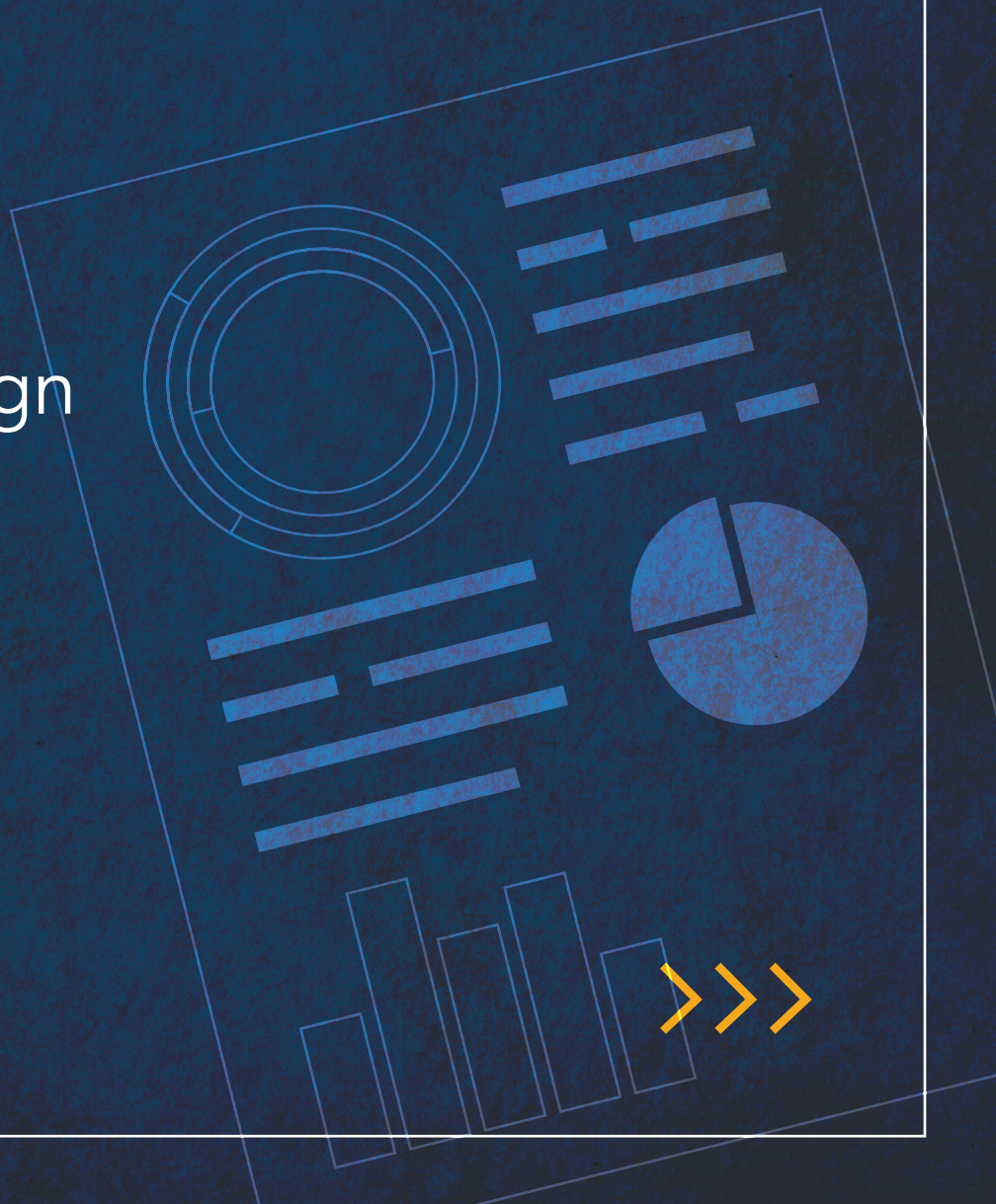
A customer newsletter is a classic example of air cover for customer marketing. You can use your marketing automation platform to send a monthly, weekly, or even daily newsletter featuring key announcements and pieces of content for your customers. Take this a step further by applying account-based principles to segment your list. You can send different customer emails based on each account's industry, company size, use cases with your solution, and so on.

Account-based advertising tools are another great way to help provide air coverage and create a halo effect for dream accounts. As they move through the funnel from the awareness stage to closed-won, you can automatically serve them relevant ads that speak to their pain points at every single stage of the buyer's journey and beyond.

REMEMBER: Marketing can't operate in a silo. You should share account engagement data with Sales on a weekly basis so your SDRs can prioritize their outreach to the warmest accounts.

PART FOUR

Measuring Success & Optimizing Your Campaign



MEASURING SUCCESS & OPTIMIZING YOUR CAMPAIGN

Measuring the success of your account-based marketing campaigns is a lot like measuring the success of any other marketing program, except this time, you're restricting your measurements to key accounts.

Let's take a look at the specific KPIs and metrics you should track based on your goals of demand generation, pipeline velocity, and customer marketing.

ABM CAMPAIGN REPORTING: DEMAND GENERATION

Inbound Leads

Outbound Leads

Measure Success with Revenue

"Unbound" Your Reporting with Account-Based Marketing

With lead generation, your leads can come from two sources: inbound and outbound. **Inbound leads** are marketing-sourced, coming from content downloads, web visits, and demo requests. **Outbound leads**, however, are sourced by the sales development team through prospecting. This issue of attribution plays a large part in the classic rift between Sales and Marketing.

For ABM to really work for demand generation, you need to "unbound" your marketing. This means forgetting about inbound leads versus outbound leads and instead rallying everyone around the same accounts. If you're doing account-based marketing right, no one individual or team — be it Marketing or Sales — should get credit for a closed-won deal.

Instead, Marketing engages target accounts across multiple coordinated channels, and Sales focuses on converting those accounts through meaningful conversations. The lead source no longer matters because there is no lead source. In most cases, there are no leads at all — just your dream accounts.

Since Marketing and Sales are measured as one line item on most businesses' P&Ls, then the efficiency of both should be measured on one number: **revenue**. It makes sense to have a common metric that allows you to measure success as a team. Read on to learn about additional metrics you should measure on the path to generating more revenue with ABM.

ABM DEMAND REPORTING: DEMAND GENERATION

Metrics to Measure for Demand Generation

Successful demand generation is essential for ABM. After all, you need to fill your pipeline with the most qualified accounts that are likely to drive revenue for your business.

KEY SUCCESS METRIC: # of Meetings or Demos Set

Easier said than done, though, right? The key is tracking the right leading indicators to ensure you're on track to setting enough meetings or demos with target accounts to fill your pipeline.

Demonstrate demand generation success by proving:

Reach
To demonstrate that you're successfully expanding to the entire buying committee at your target accounts, show that you're reaching more contacts at each with your marketing activities.

Marketing Engagement
More of your target audience visiting your website, downloading content, and/or attending events is a great way to demonstrate increased demand.

Sales Engagement
It's not just about marketing, though! If your demand gen campaign is successful, your sales team will have more productive conversations and schedule more demos or meetings.

Executive Awareness
With account-based marketing, it's critical to generate awareness among the right people at target accounts, including executive stakeholders with decision-making power.

ABM DEMAND REPORTING: DEMAND GENERATION

Don't measure your demand generation success using vanity metrics like:

Net-New Leads

It doesn't matter how many leads you're generating with your marketing activities if those leads don't fit your ideal customer profile. Instead of tracking net-new leads, pay attention to how many leads you're generating specifically from your dream accounts.

Marketing Qualified Leads

Unless you're doing Bolt-On ABM, it's also time to do away with marketing qualified leads. Even with a Bolt-On approach, you should still rigorously qualify your inbound leads in terms of account quality, not just lead quality.

Click-Through Rates

If you're running account-based ads to generate demand in your target accounts, a high CTR should not be a major focus of your campaign. That's because these ads should serve as tools to generate awareness rather than convert leads.

Conversion Rates

Like CTR, conversion rate is a poor indicator of demand generation success. When you already know exactly who you're targeting with your ABM campaign, you don't need them to convert; you just need to engage with them across multiple channels.

Tracking engagement, awareness, and progression metrics and avoiding inbound/outbound labels and vanity metrics will allow you to report on your demand generation campaigns most effectively. When you know exactly which accounts you're targeting before the start of your campaign, you can focus all your sales and marketing efforts on getting the highest reach and engagement from each account, resulting in better quality conversations and more meetings set.

ABM CAMPAIGN REPORTING: PIPELINE VELOCITY

Pipeline velocity is all about moving accounts through the funnel more quickly, so all your key performance indicators should point back to progression through the sales cycle.

KEY SUCCESS METRIC: Progression of Target Accounts

The indicators of pipeline velocity success include:

Timeline of Stage Progression

How quickly are your opportunities moving to each subsequent stage of the sales process as defined in your CRM? This timeline should decrease with an effective pipeline velocity campaign.

Sales Cycle Length

If the time per stage decreases, so should your entire sales cycle. Show that your campaign helped decrease the amount of time it takes an account to go from "click to close," or from first touch to closed-won.

Engagement Rates Within Accounts

Are contacts in your dream accounts engaging with your sales and marketing activities at higher rates as they move through the buyer's journey?

Engaged Contacts Within Accounts

How many members of the buying committee at your dream accounts are engaging with your sales and marketing activities? Are more stakeholders visiting your site, engaging with content, and having sales conversations?

Win Rates

If your smarketing efforts are decreasing the length of your sales cycle but your win rates are also decreasing, something is amiss. Keep an eye on your win rates to ensure you're not sacrificing thoroughness for speed.

ABM CAMPAIGN REPORTING: PIPELINE VELOCITY

TERMINUS TIP

If you're using the Terminus to run account-based ads and you've integrated Terminus with your Salesforce instance, you can easily measure account progression right in the Terminus platform. The sample pipeline velocity campaign report below shows a campaign targeting IT Operations and Marketing professionals from 190 accounts. Of those accounts:

- 36 progressed to the Negotiation stage of the sales cycle with an average velocity of 9 days.
- 12 progressed from Negotiation to Contract in 5 days average.
- 9 closed for a total of $360,000 ARR.

No two B2B buying processes are exactly alike. By pulling in your data from Salesforce, Terminus allows you to report on how quickly your target accounts progress to each unique stage of the buyer's journey — and how your ABM campaigns directly contribute to revenue.

Pipeline IT & Marketing Persona Campaign

TARGETED	MATCHED	ENGAGED
190 ACCOUNTS	160 ACCOUNTS	144 ACCOUNTS
$ 7,600,000	$ 6,400,00	$ 5,760,000

25%

36 PROGRESSED ACCOUNTS

$ 1,440,000

TACTIC	ACCOUNTS	AUDIENCE
IT Operations	144	Stage IS Demo, Proposal Probability > 50%
Marketing	144	Stage IS Demo, Proposal Probability > 50%

STAGE	ACCOUNTS	REVENUE	VELOCITY
Negotiation	36	$ 1,440,000	9 days
Contract	12	$ 480,000	5 days
Closed - Won	9	$ 360,000	-

ABM CAMPAIGN REPORTING: CUSTOMER MARKETING

First things first: you'll need to get together with your customer success team. Chances are, both your customer success and marketing teams are already tracking metrics that focus on customer accounts. It's time to get on the same page and work together towards the same KPIs.

Because customer marketing campaigns can have a variety of goals, there isn't a single key metric that applies to all customer-focused ABM campaigns.

Depending on your goals, your most important customer marketing metrics may include:

Product Usage

This KPI, which primarily applies to SaaS companies, can be measured by the level of engagement users have with your product and the number of engaged users. Think about it like this: if you only have one or two end users at each customer account, what will happen if those individuals change roles or leave the organization? You'll have to sell your product to the same company all over again, either literally or figuratively.

Churn Rate

You can calculate your churn rate in terms of both revenue and number of customer accounts. While an annual churn rate of 7% or under is acceptable for most B2B companies, best-in-class SaaS providers actually have net negative churn — meaning they're generating enough revenue from new customers, rejoined customers, and expansions to offset attrition.

Renewal Rate

The flipside of churn rate is renewal rate, which you can measure in terms customer retention rate and dollar retention rate.

Customer Rejoins

Customer rejoins — also referred to as reactivations or win-backs — are an important way to measure the success of your business. It's easier to win back old customers than to acquire new ones, so it only makes sense to put resources into turning churned customers back into customers and measuring how successful your efforts are.

ABM CAMPAIGN REPORTING: CUSTOMER MARKETING

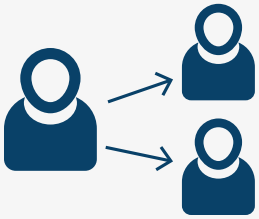
Important customer marketing metrics may include:

Monthly/Annual Recurring Revenue

No doubt your sales team is already measuring your monthly and annual recurring revenue (MRR and ARR). But do Marketing and Customer Success feel responsible for those numbers as well? They should. With ABM, every team is held accountable for revenue, so everyone on your sales, marketing, and customer success teams should understand these metrics and how they contribute to them.

Average Contract Value

Average contract value (ACV) measures how much the average customer pays you per contract period — usually 12 months. One goal of customer marketing, of course, is to increase the ACV of your current customer accounts.



Referrals

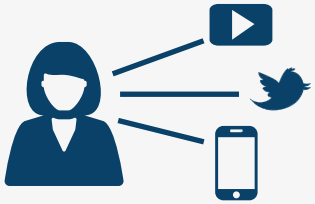
Referrals are a marketer's secret weapon. According to Edelman, 84% of B2B companies begin the buying process with a referral. You should measure the number and percentage of new deals that are influenced in part by a customer referral.

Positive Reviews

Track the number or percentage of positive reviews on platforms like G2Crowd, the Salesforce AppExchange, and industry-specific review sites. You can enlist your customer success team to encourage customer reviews, or you can leverage client advocacy software to drive reviews.

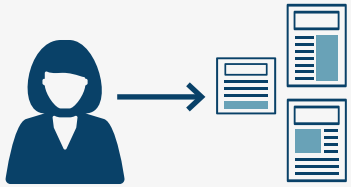
ABM CAMPAIGN REPORTING: CUSTOMER MARKETING

Important customer marketing metrics may include:



Engagement with Content

Content engagement can be measured in two ways: the number of accounts engaging with marketing content and the number of individuals per account that are engaging. If these numbers are low, either you're not creating the right content for your clients or you're not doing a good job distributing that content.



Engagement with Ads

If you're running digital ad campaigns targeted at specific customer accounts, you'll want to track the levels of engagement with your ads at the account level. This is especially important when you're running a cross-sell, upsell, or renewal campaign using using display advertising.

Support Tickets

If your customer support team uses a help desk ticketing system, you should be tracking the number and type of support tickets that come in and how quickly they're being resolved. This highlights the efficiency of your support team and provides you with insight into pain points you should create additional content around. Plus, tracking support tickets at the account level will allow you to see which customers require the most help and resources, shedding light on which types of accounts may not may not be good fits for your business.

ABM CAMPAIGN REPORTING: CUSTOMER MARKETING

Customer Marketing KPIs to Wow Your C-Suite

All of the metrics on the previous pages are important for your marketing and customer success teams to track, but your executive team probably doesn't need to hear how many new reviews your product gets on a weekly basis.

Instead, you should report on KPIs that point to your ABM program's impact on revenue and customer retention. The most important metrics to report to your C-suite are:

- Increased MRR/ARR
- Decreased churn
- Increased marketing influence on renewals, upsells, and expansions
- Increased deals from referrals

Qualitative Results Matter for Customer Marketing, Too!

Data-driven marketers know the importance of setting goals, measuring success, and optimizing your efforts to drive more results. But it's important to remember that not all success can be measured in dollars or numbers.

Some of the most important measures of customer marketing success are qualitative. How do your customers feel about your product or services? How can you improve, and what's working that you should double down on? Technology makes it easy to solicit customer feedback via email and qualitative surveys.

And while it may sound obvious, don't be afraid to pick up your phone and actually call your customers. Ask them candidly what they like or dislike about your solution, your content, and your customer service. Often, you can learn a lot more in a five-minute phone call than you can from survey answers that someone shot off during a boring meeting.

You should also look at support tickets to identify areas for improvement on both an aggregate and the account level.

When you use these account-based metrics to report on your customer marketing initiatives, you'll be able to better track the effectiveness of your campaigns and tactics at an account level to demonstrate that your marketing and customer success teams are creating a positive customer experience and driving revenue for your organization.

OPTIMIZE, OPTIMIZE, OPTIMIZE!

Not only does reporting on the right KPIs allow you to measure the success of your ABM campaigns, it also allows you to be agile with your marketing.

Leveraging "Vanity Metrics" Effectively

Engagement KPIs that may not be good indicators of overall ABM success can still be useful in determining:

- Messaging that resonates with your target accounts and buyer personas
- Topics and content that are most effective at each stage of the buyer and customer journey
- Calls to action that drive the highest activity within accounts

In these cases, metrics like ad clickthrough rate and conversion rate can help you optimize your campaigns. ***Do not*** take them as indicators of overall campaign success, but you can and should use the results to make sure your messaging, creative, and content are as effective as possible.

Avoiding Marketing Fatigue

To avoid inducing ad fatigue in accounts you target over long periods of time, we recommend switching out yyour campaign creative every 45 days. This ensures you're always delivering the right personalized message and ultimately increases engagement with your target accounts.

The same goes for other types of marketing collateral and tactics, such as website personalization. Any dynamic content or account-specific webpages you create should be updated and optimized throughout your engagement with the account.

PART FIVE

The Terminus 500 Campaign: A Case Study

> Account-based marketing is in our DNA at Terminus, but as the B2B landscape changes, there's still so much we can learn. We're constantly pushing ourselves to try new things with our ABM program, and the Terminus 500 campaign is a perfect example of that.

– **STEPHANIE KELLY**, Director of Account-Based Marketing at Terminus

PLANNING THE TERMINUS 500 CAMPAIGN

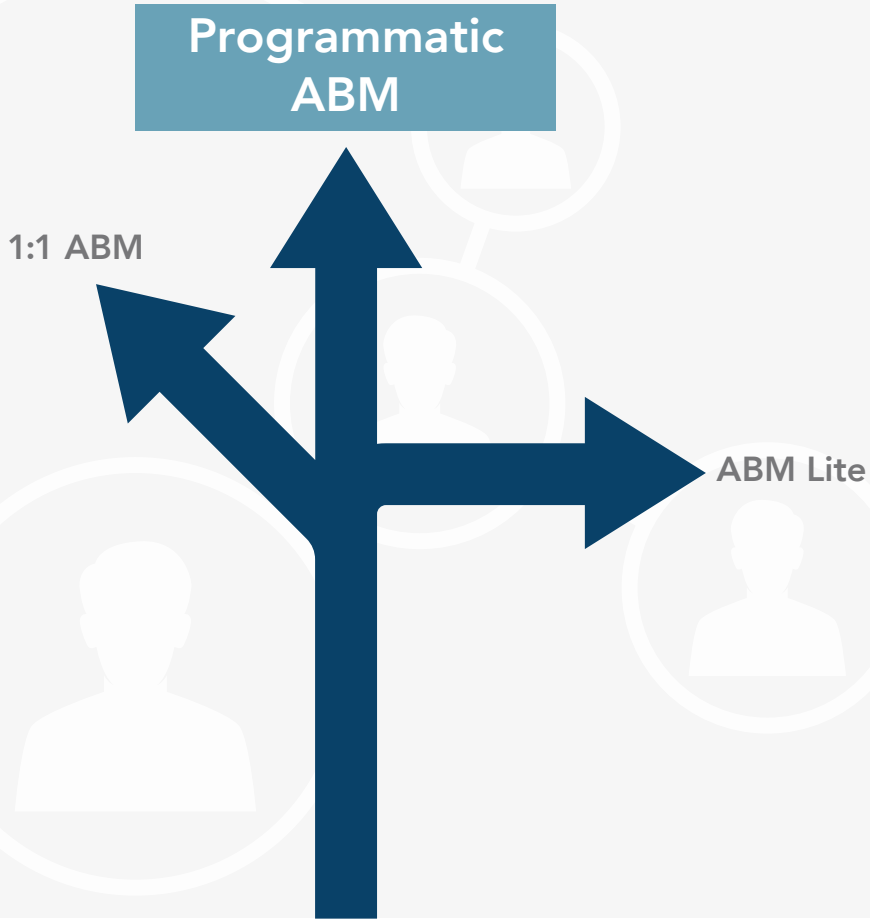
Taking a Programmatic Approach to Demand Generation

In the past, our Sales, Marketing, and Customer Success teams had worked together to run 1:1 ABM and ABM Lite campaigns to generate demand, accelerate pipeline velocity, and build stronger relationships with our customers.

Something we hadn't tried was running a Programmatic ABM campaign on a list of hundreds of handpicked accounts. Our sales and marketing leadership had been talking about getting started with Programmatic ABM for a while, but we knew we needed to do it right.

At the end of 2016, we were ready. Our sales development team was growing, we had just hired a Chief Revenue Officer, and our marketing team had nearly doubled in just four months. It was time to scale our ABM program, and we had all the resources we needed to do it.

We developed the Terminus 500 campaign to generate demand in our dream accounts. If we ran a successful campaign, our dream accounts would complete a demo with an account executive and convert into a sales opportunity.



PLANNING THE TERMINUS 500 CAMPAIGN

Identifying Our Top 500 Dream Accounts

The decision to select 500 dream accounts came down to a few different factors.

- We knew we could find 500 best-fit accounts without exhausting our total addressable market (TAM).
- 500 accounts is a manageable number for our SDRs to work over the course of a quarter.
- We had the data, the technology stack, and the workforce needed to identify 500 unique accounts that matched our ideal customer profile (ICP).

We identified our 500 dream accounts using a combination of automation and manual research. Using tools like our Salesforce CRM, LeadIQ, and ZoomInfo, we were able to find plenty of accounts that fit our ICP — but we ran into our first obstacle when we realized they weren't all good fits for the campaign.

"We have a lot of touches in our Salesforce, so trying to find accounts that were not currently being worked was somewhat of a challenge," explains Stephanie Kelly, Director of Account-Based Marketing at Terminus.

Because this was our first Programmatic ABM campaign, we wanted to test drive our processes only with accounts that we hadn't recently engaged.

We chose to exclude any accounts that showed any touches in Salesforce within the previous 60 days to make sure we weren't inundating current prospects with inconsistent messaging. Focusing only on inactive and net-new accounts also allowed us to make sure the Terminus 500 campaign was the only factor driving engagement and account progression, so we could better measure our results.

PLANNING THE TERMINUS 500 CAMPAIGN

Expanding Our Reach Within Accounts

To expand our reach to additional decision-makers at our dream accounts, we used ABM technology as well as manual research.

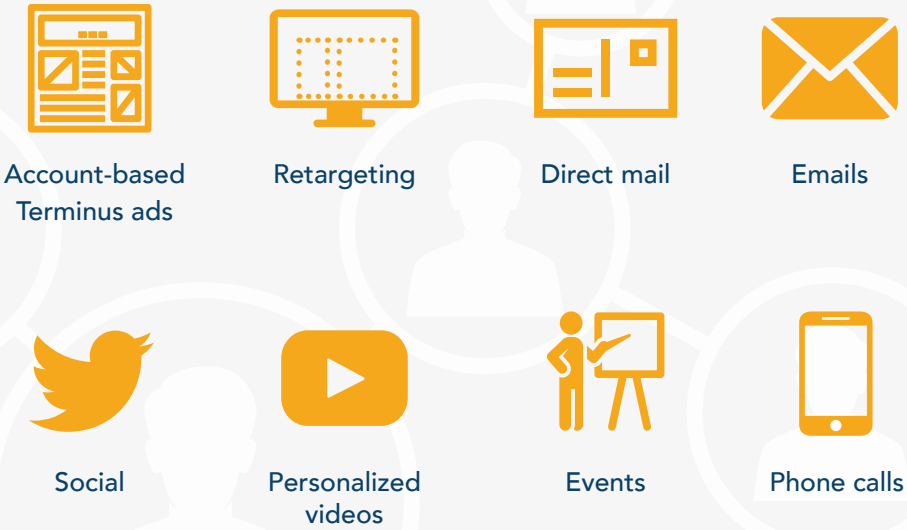
We use the Terminus platform to automatically serve ads to the right people at our target accounts, even if we don't have their contact information in Salesforce. However, due to privacy laws, all that targeting magic happens on the backend, so we have to do some manual sleuthing to get in touch via email, social media, and phone.

It's up to our SDRs to do the necessary research to build out the profiles of all our buyer personas at our dream accounts. They do this primarily using LinkedIn Sales Navigator. Because we sell to marketers and marketers tend to be active on LinkedIn, we've found that this self-reported data is more accurate than any other source.

Selecting Our Tactics & Channels

We knew we needed to engage our dream accounts using a variety of tactics and channels in order to have the most impact. We selected a combination of low-tech but highly personalized touchpoints, such as phone calls and events, and high-tech, automated touchpoints, like marketing emails and account-based ads.

This strategic marketing mix allowed us to build awareness within our dream accounts before our SDRs began 1:1 outreach.



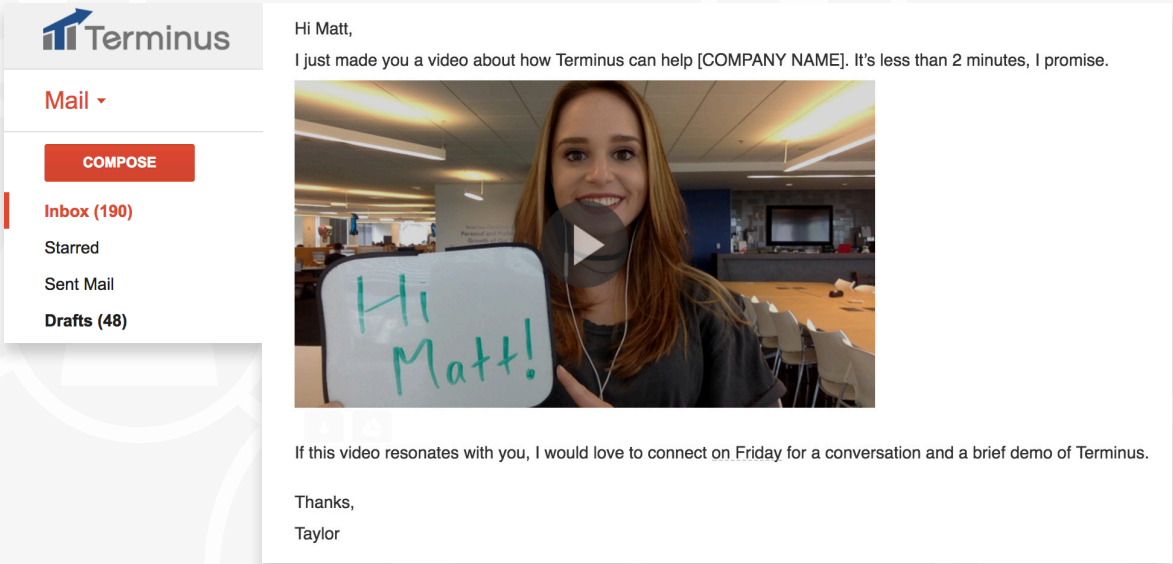
PLANNING THE TERMINUS 500 CAMPAIGN

Developing Campaign Creative & Messaging

Because generating demand and setting demos with our dream accounts was the goal of the Terminus 500 campaign, we knew the most effective messaging would provide a high-level overview of the benefits of ABM and the Terminus platform.

One of our biggest priorities in developing our campaign creative and messaging was consistency. "We crafted our SDR emails and personalized videos to resonate with the messaging the prospect saw in our display advertisements and marketing content," explained Stephanie. "The goal was to connect the dots and give them a consistent experience everywhere they engaged with Terminus."

Terminus ads

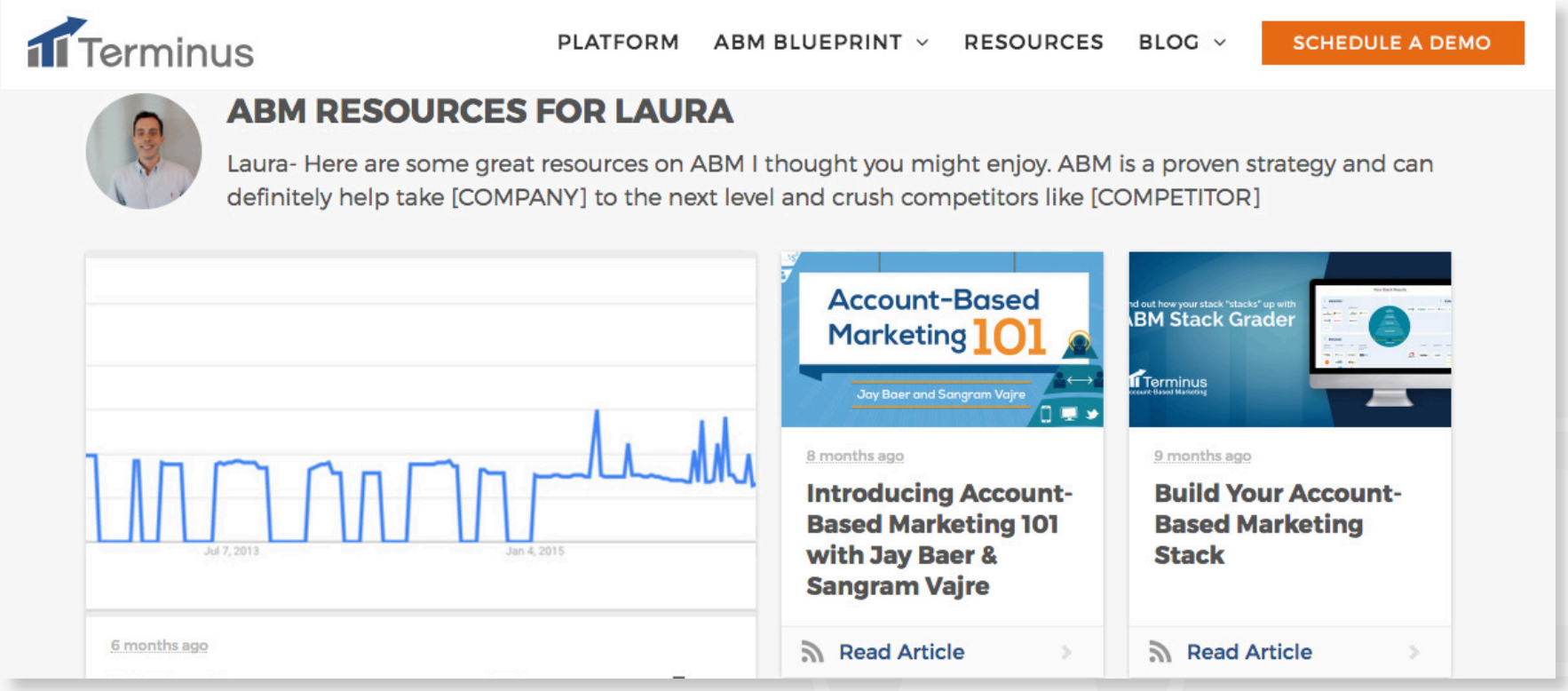


Sample SDR email using a personalized Vidyard video

PLANNING THE TERMINUS 500 CAMPAIGN

Mapping Out Our ABM Touches

The marketing touches for the campaign were all automated, but the sales touches were not. Our sales development team pretty much lives in SalesLoft, a tool that allows us create cadences of sales touches like emails, social outreach, personalized videos, and phone calls. SalesLoft shows our SDRs the steps they need to complete in their cadences that day so they never miss a step. They also use Uberflip Sales Streams to curate relevant content for contacts at our dream accounts.



Sample Uberflip Sales Stream, personalized for a prospect

PLANNING THE TERMINUS 500 CAMPAIGN

Here's an overview of our campaign orchestration roadmap for the Terminus 500 campaign. As you can see, it includes time-sensitive touches from both Marketing and Sales.

EXAMPLE PLAYBOOK

The Sales & Marketing Terminus 500 Cadence

MARKETING TOUCH POINTS

Pre-cadence: Terminus Ads

During cadence: LinkedIn and Facebook retargeting to known contacts

After 1st 8 days: Direct mail to unresponsive accounts

SALES TOUCH POINTS

Day 1: Personalized video email
Day 2: Email
Day 2: Call, LVM
Day 4: LinkedIn (Attempt to connect)
Day 6: Inmail
Day 7: Video email (Sangram)
Day 8: Call, no VM
Day 8: Direct mail
Day 13: Call, LVM about the package
Day 13: Email about the package
Day 15: Video Email
Day 16: Call, no VM
Day 20: Breakup video email

ENGAGING WITH OUR DREAM 500 ACCOUNTS

Running Account-Based Ads Using Terminus

The first month of the campaign was focused solely on pretargeting. Using the Terminus platform, we served account-based ads to decision-makers at our dream accounts in order to warm them up and generate awareness before our SDR team started reaching out.

During this time, we were able to see which accounts had the most engagement with our ads. Based on this data, we split our target accounts into two groups: Phase One and Phase Two accounts.

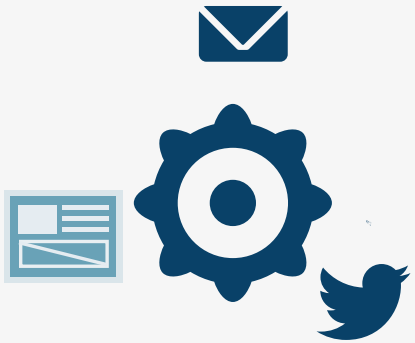
Prospect	Reach	Impressions	Clicks	Spend
Live for 148 days	53	80,742	28	$696.73
Live for 148 days	17,540	55,929	22	$474.83
Live for 148 days	3,062	689	1	$6.08
Live for 148 days	3,657	3,520	2	$31.00
Live for 148 days	1,486	2,313	1	$20.23
Live for 148 days	608	1,416	1	$12.00

ENGAGING WITH OUR DREAM 500 ACCOUNTS

SDR Outreach: Phase One & Phase Two Accounts

The 250 dream accounts that showed the highest engagement with Terminus ads during the pretargeting phase of the campaign were selected as Phase One accounts. Our sales development team started working their cadences on these accounts after they had been exposed to our ads for at least three weeks, that way they were already familiar with our solution before they received SDR outreach.

Each SDR was assigned to approximately 15 accounts during Phase One of the campaign and 15 accounts during Phase Two. Minimizing number of accounts each SDR was responsible for at one time allowed them to focus on researching their accounts and personalizing their outreach and conversations.



Air Cover From Marketing

As the SDRs executed their outreach and started 1:1 conversations with our dream accounts, Marketing was still working behind the scenes to provide air cover for Sales. We continued running Terminus ads for the duration of the three-month campaign. This help us stay top-of-mind with prospects who were engaging with our sales team, and it also helped nurture accounts that weren't immediately responsive to SDR outreach.

Staying Aligned Throughout the Campaign

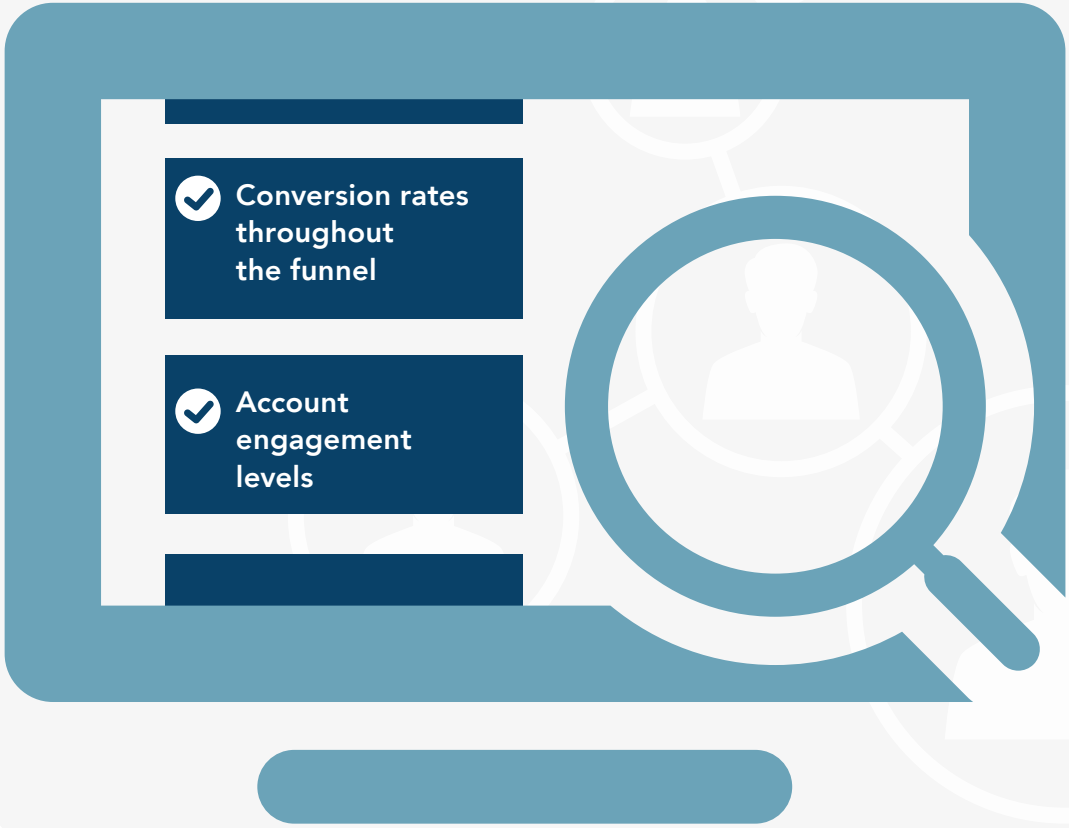
We had lots of players involved in the Terminus 500 campaign, so keeping everyone on the same page was critical to our success. We've always held weekly "smarketing" meetings with our core ABM team, and these meetings only improved during the Terminus 500 campaign.

Each week, we meet to look at success metrics like account progression and engagement and talk about any challenges and big wins from the campaign. This gives us a chance to be agile with our marketing and sales strategies, switching out ad creative when necessary, modifying our talk tracks, and providing additional marketing support for specific dream accounts.

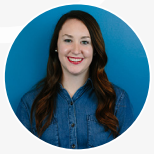
OPTIMIZING THE CAMPAIGN

Preliminary Results

Due to the length of our sales cycle, we don't yet have definitive results to report from our Terminus 500 campaign. As the accounts we engaged during the campaign continue to move through the pipeline and turn into customers, we will continue to track:



> Our SDR team loves the 'unbound' approach to demand generation because we get a lot of support from Marketing. I've had a lot more people from target accounts downloading content over the past few months because Marketing has been focused on creating relevant content.
>
> – MORGAN GILLESPIE, Sales Development Rep at Terminus



OPTIMIZING THE CAMPAIGN

Next Steps for the Terminus 500 Campaign

The first iteration of the Terminus 500 campaign was an excellent learning experience for our team. Based on our successes and the lessons we learned, we decided to launch version 2.0 of the campaign in in mid-2017.

We're optimizing the campaign the second time around by focusing on:

- **Sales Coaching & Accountability.** ABM success relies on not just a great campaign plan, but also on every single player involved executing on the right plays at the right time. In the second iteration of Terminus 500, our SDR Manager is meeting weekly with each individual Sales Development Reps. In addition to ongoing sales coaching (see page 48) he also makes sure they have the resources they need to execute on each tactic and touchpoint of the campaign on schedule.

- **Account Selection**. As the market changes and we make enhancements to our platform, our ideal customer profile may change. We're very cognizant of this, and we check in frequently to discuss our ICP and whether we need to adjust any factors that go into it. We've also found that in our Terminus 500 pilot campaign, technology companies converted at higher rates than other types of accounts, so we're honing in on high tech verticals this time around.

- **Number of Target Accounts.** We've got a long list of dream accounts, but we've realized we don't need to target so many of them at once. Moving forward, we plan to target just one to three hundred accounts at a time. That way, we can allocate more media spend per account to increase the reach of our Terminus ads, and our SDRs will have more time to do research and personalize their conversations with stakeholders at each target account.

- **Changes to the Sales Process.** Over the past few months, we've tested out a variety of ways to approach the first sales call. During the first iteration of the Terminus 500 campaign, our SDRs were responsible for setting demos with our dream accounts. Now, however, our first call focuses on ABM strategy rather than the Terminus product. This gives us the chance to prove to our dream accounts the value we can provide for their ABM strategy without diving right into a product pitch.

CONCLUSION

No one said winning over your dream accounts would be easy, but account-based marketing proves it's possible.

Everyone wants to proudly display the Google, Microsoft, Apple, and Starbucks logos on the customer page of their website. But if you wait for them to come to you, you'll be waiting forever.

That's why you need to build a core ABM team whose shared goal is to proactively go after your dream accounts and turn them into high-value customers.

By setting account-focused goals, drawing up a solid campaign plan, and optimizing your ABM program on a regular basis, you can win those logos and drive more revenue for your business — as a team.

Terminus is the leading account-based marketing platform that enables B2B marketers to target accounts, engage decision-makers, and accelerate marketing and sales pipeline velocity at scale. If you'd like to learn more about how Terminus digital advertising can become an integral part of your ABM strategy, **schedule a time to chat** with one of our ABM specialists now.

WORKSHEETS

WORKSHEET > 1.1

DEMAND GENERATION: PRETARGETING CAMPAIGN PLANNING

Campaign Name _____

Campaign Purpose

Warm up target accounts with account-based advertisements to generate awareness prior to Sales outreach.

Stage of the Customer Journey

- [x] **Demand Generation**
- [ ] Pipeline Velocity
- [ ] Customer Marketing

KPIs

Leading Indicators of Success

- Account engagement levels
- Ad impressions
- Length of time ads and content are viewed
- Website visits
- Coverage – number of contacts reached within the account
- Awareness
- Email open rates/reply rates

Lagging Indicators of Success

- Event attendance
- Meetings/calls/demos set
- Pipeline created

DEMAND GENERATION: PRETARGETING CAMPAIGN PLANNING

Identify: Select Best-Fit Accounts

Define your target accounts list for this campaign. Either describe the attributes you'll use to define your the segment of accounts (industry, company size, technology used, etc.) or name the accounts to target.

Approach to ABM

- ☐ Bolt-On ABM
- ☐ ABM Lite (10-100 accounts)
- ☐ 1:1 ABM (1-10 accounts)
- ☐ Programmatic ABM (100-1000 accounts)

Attributes

- ☐ Industry: _____
- ☐ Company size: _____
- ☐ Revenue: _____
- ☐ Product interest: _____
- ☐ Current technology: _____
- ☐ Competitor's customer: _____
- ☐ Other: _____

_____

_____

OR

Named Accounts (1:1 ABM Only)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Number of Target Accounts:

_____

DEMAND GENERATION: PRETARGETING CAMPAIGN PLANNING

Expand Within Accounts

Who are the personas you will engage within your target accounts?

Buyer Personas

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

Target Number of Contacts Per Account: _____

Consider the number of individuals in a typical customer's buying committee

Accounts + Persona = Audience

Craft Your Message

What is the overarching message you want your audience to take away from the campaign? Because you're focusing on brand awareness, consider what will make your company and solution stand out from your competitors and from other digital ad campaigns.

_____

_____

_____

_____

WORKSHEET >1.4

DEMAND GENERATION: PRETARGETING CAMPAIGN PLANNING

Create Content

What are the key pieces of content and creative you'll need to leverage or create for this campaign? You will need ad creative, but you'll also need to point those ads to a landing page featuring awareness/educational content. Common assets for pretargeting campaigns include blog posts, e-books, white papers, and short, consumable videos.

_____ _____ _____ _____

_____ _____ _____ _____

_____ _____ _____ _____

Choose Channels & Tactics

- ☐ Marketing emails
- ☐ Sales emails
- ☐ Phone calls
- ☐ Personalized videos
- ☐ Website personalization
- ☐ Custom content
- ☐ Direct mail
- ☐ Events
- ☐ Account-based ads
- ☐ Retargeting
- ☐ Webinars & virtual events
- ☐ Other _____
- ☐ Other _____

Orchestrate

Use the **Campaign Orchestration Planning Template** to map out every step of your ABM campaign, from first marketing touch to Sales engagement and beyond. Remember, you can use pretargeting as a standalone campaign or in conjunction with other plays for a more complex campaign that spans the customer lifecycle.

WORKSHEET > 2.1

DEMAND GENERATION: ACCOUNT NURTURE CAMPAIGN PLANNING

Campaign Name _____

Campaign Purpose

Nurture best-fit accounts in your database to further qualify them and convert them into sales opportunities.

- [x] **Demand Generation**
- [ ] Pipeline Velocity
- [ ] Customer Marketing

KPIs

Leading Indicators of Success

- Account engagement levels
- Ad impressions
- Length of time ads and content are viewed
- Website visits
- Coverage – number of contacts reached within the account
- Awareness
- MQAs generated

Lagging Indicators of Success

- • Meetings/calls/demos set
- • Sales qualified/accepted accounts (SQAs/SAAs) generated
- • Pipeline created

DEMAND GENERATION: ACCOUNT NURTURE CAMPAIGN PLANNING

Identify: Select Best-Fit Accounts

Define your target accounts list for this campaign. Either describe the attributes you'll use to define your the segment of accounts (industry, company size, technology used, etc.) or name the accounts to target.

Approach to ABM

- ☐ Bolt-On ABM
- ☐ ABM Lite (10-100 accounts)
- ☐ 1:1 ABM (1-10 accounts)
- ☐ Programmatic ABM (100-1000 accounts)

Attributes

- ☐ Industry: _____
- ☐ Company size: _____
- ☐ Revenue: _____
- ☐ Product interest: _____
- ☐ Current technology: _____
- ☐ Competitor's customer: _____
- ☐ Other: _____

_____

_____

OR

Named Accounts (1:1 ABM Only)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Number of Target Accounts:

_____

DEMAND GENERATION: ACCOUNT NURTURE CAMPAIGN PLANNING

Expand Within Accounts

Who are the personas that you will target within your target accounts?

Buyer Personas

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

Target Number of Contacts Per Account: _____

Consider the number of individuals in a typical customer's buying committee

Accounts + Persona = Audience

Craft Your Message

What is the overarching message you want your audience to take away from the campaign? How will you engage your target accounts and get them interested in your solution? The goal of your messaging should be to build a rapport with with your audience and set your Sales team up for success.

_____

_____

_____

_____

DEMAND GENERATION: ACCOUNT NURTURE CAMPAIGN PLANNING

Create Content

What are the key pieces of content and creative you'll need to leverage or create for this campaign? Common assets for account nurtures include blog posts, e-books, white papers, and videos.

_____ _____ _____ _____

_____ _____ _____ _____

_____ _____ _____ _____

Choose Channels & Tactics

- ☐ Marketing emails
- ☐ Sales emails
- ☐ Phone calls
- ☐ Personalized videos
- ☐ Website personalization
- ☐ Custom content
- ☐ Direct mail
- ☐ Social selling
- ☐ Account-based ads
- ☐ Retargeting
- ☐ Webinars & virtual events
- ☐ Events
- ☐ Other _____
- ☐ Other _____

Orchestrate

Use the **Campaign Orchestration Planning Template** to map out every step of your ABM campaign, from first marketing touch to Sales engagement and beyond. Remember, you can use an account nurture play as a standalone campaign or in conjunction with other plays for a more complex campaign that spans the customer lifecycle.

WORKSHEET > 3.1

DEMAND GENERATION: LEAD-TO-ACCOUNT NURTURE

Campaign Name _____

Campaign Purpose

When you generate leads from companies that fit your ideal customer profile, expand your reach to the entire buying committee and convert them into sales opportunities

Stage of the Customer Journey

- [x] **Demand Generation**
- [ ] Pipeline Velocity
- [ ] Customer Marketing

KPIs

Leading Indicators of Success

- Account engagement levels
- Ad impressions
- Length of times ads and content are viewed
- Website visits
- Coverage – number of contacts reached within the account
- Awareness
- MQAs generated

Lagging Indicators of Success

- Meetings/calls/demos set
- Sales qualified/accepted accounts (SQAs/SAAs) generated
- Pipeline created

DEMAND GENERATION: LEAD-TO-ACCOUNT NURTURE

Identify: Select Best-Fit Accounts

If you generate a large volume of leads and have the resources to segment them reliably, you can get extremely granular with your targeting in a lead-to-account nurture. If you do, use this section of the worksheet to define the attributes of your target accounts for this particular campaign.

Approach to ABM

- [x] **Bolt-On ABM**
- [ ] ABM Lite (10-100 accounts)
- [ ] 1:1 ABM (1-10 accounts)
- [ ] Programmatic ABM (100-1000 accounts)

Attributes

- [ ] Industry: _____
- [ ] Company size: _____
- [ ] Revenue: _____
- [ ] Product interest: _____
- [ ] Current technology: _____
- [ ] Competitor's customer: _____
- [ ] Other: _____

_____

_____

DEMAND GENERATION: LEAD-TO-ACCOUNT NURTURE

Expand Within Accounts

Who are the personas you will engage within your target accounts?

Buyer Personas

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

Target Number of Contacts Per Account: _____

Consider the number of individuals in a typical customer's buying committee

Accounts + Persona = Audience

Craft Your Message

What is the overarching message you want your audience to take away from the campaign? How will you engage your target accounts and get them interested in your solution? The goal of your messaging should be to build a rapport with with your audience and set your Sales team up for success.

_____

_____

_____

_____

DEMAND GENERATION: LEAD-TO-ACCOUNT NURTURE

Create Content

What are the key pieces of content and creative you'll need to leverage or create for this campaign? Common assets for lead-to-account nurtures include blog posts, e-books, white papers, and videos.

_____ _____ _____ _____

_____ _____ _____ _____

_____ _____ _____ _____

Choose Channels & Tactics

- ☐ Marketing emails (lead only)
- ☐ Sales emails (lead + other decision-makers)
- ☐ Phone calls (lead + other decision-makers)
- ☐ Personalized videos (lead + other decision-makers)
- ☐ Website personalization
- ☐ Custom content
- ☐ Social selling (lead + other decision-makers)
- ☐ Account-based ads (lead + other decision-makers)
- ☐ Retargeting (lead only)
- ☐ Direct mail (lead + other decision-makers)
- ☐ Other _____
- ☐ Other _____

Orchestrate

Use the **Campaign Orchestration Planning Template** to map out every step of your ABM campaign, from first marketing touch to Sales engagement and beyond.

WORKSHEET > 4.1

PIPELINE VELOCITY: PIPELINE ACCELERATION CAMPAIGN PLANNING

Campaign Name _____

Campaign Purpose

Decrease the time it takes for accounts to move from _____ to _____
stage name stage name

Stage of the Customer Journey

☐ Demand Generation ☑ **Pipeline Velocity** ☐ Customer Marketing

KPIs

Leading Indicators of Success

- Account engagement levels
- Coverage – number of contacts reached within the account
- Meetings/calls/demos set
- Progression rate – percentage of accounts that progress from _____ stage of the sales cycle to _____ stage
- Time to progress to the next stage of the sales cycle

Lagging Indicators of Success

- Marketing sourced pipeline
- Sales opportunities created
- Decreased sales cycle length
- Closed-won deals
- Increased deal size
- Increased win rate
- ROI

PIPELINE VELOCITY: PIPELINE ACCELERATION CAMPAIGN PLANNING

Identify: Select Best-Fit Accounts

Define your target accounts list for this campaign. Either describe the attributes you'll use to define your the segment of accounts (industry, company size, technology used, etc.) or name the accounts to target.

Approach to ABM

- ☐ Bolt-On ABM
- ☐ ABM Lite (10-100 accounts)
- ☐ 1:1 ABM (1-10 accounts)
- ☐ Programmatic ABM (100-1000 accounts)

Attributes

- ☐ Industry: _____
- ☐ Company size: _____
- ☐ Revenue: _____
- ☐ Product interest: _____
- ☐ Current technology: _____
- ☐ Competitor's customer: _____
- ☐ Other: _____

_____

_____

OR

Named Accounts (1:1 ABM Only)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Number of Target Accounts:

_____

WORKSHEET > 4.3

PIPELINE VELOCITY: PIPELINE ACCELERATION CAMPAIGN PLANNING

Expand Within Accounts

Who are the personas you will engage within your target accounts?

Buyer Personas

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

Target Number of Contacts Per Account: _____

Consider the number of individuals in a typical customer's buying committee

Accounts + Persona = Audience

Craft Your Message

What is the overarching message you want your audience to take away from the campaign? How will you compel your target accounts to take the necessary action to progress to the next stage of the sales cycle? Consider your audience's pain points, common objections, and level of familiarity with your solution.

_____

_____

_____

_____

PIPELINE VELOCITY: PIPELINE ACCELERATION CAMPAIGN PLANNING

Create Content

What are the key pieces of content and creative you'll need to leverage or create for this campaign? Common assets for pipeline acceleration campaigns include webinars, video testimonials, customer case studies, competitive analyses, how-to content, and proof of ROI.

_____ _____ _____ _____

_____ _____ _____ _____

_____ _____ _____ _____

Choose Channels & Tactics

- ☐ Marketing emails
- ☐ Sales emails
- ☐ Phone calls
- ☐ Personalized videos
- ☐ Website personalization
- ☐ Custom content
- ☐ Direct Mail
- ☐ Social selling
- ☐ Account-based ads
- ☐ Retargeting
- ☐ In-person events
- ☐ Webinars & virtual events
- ☐ Other _____
- ☐ Other _____

Orchestrate

Use the Campaign Orchestration Planning Template to map out every step of your ABM campaign, from first marketing touch to Sales engagement and beyond. Remember, you can use a pipeline velocity play as a standalone campaign or in conjunction with other plays for a more complex campaign that spans the customer lifecycle.

WORKSHEET > 5.1

PIPELINE VELOCITY: WAKE THE DEAD CAMPAIGN PLANNING

Campaign Name _____

Campaign Purpose

Reengage inactive accounts in our database that fit our ideal customer profile and turn them into sales opportunities

Stage of the Customer Journey

☐ Demand Generation ☑ **Pipeline Velocity** ☐ Customer Marketing

KPIs

Leading Indicators of Success

- Number of accounts reengaged
- Account engagement levels
- Coverage – number of contacts reached within the account
- Meetings/calls/demos set
- Progression rate – percentage of accounts that progress from _____ stage of the sales cycle to _____ stage
- Time to progress to the next stage of the sales cycle
- Length of time ads and content are viewed

Lagging Indicators of Success

- Opportunities created
- Length of the sales cycle
- Closed-won deals
- ROI

PIPELINE VELOCITY: WAKE THE DEAD CAMPAIGN PLANNING

Identify: Select Best-Fit Accounts

Define your target accounts list for this campaign. Either describe the attributes you'll use to define your the segment of accounts (industry, company size, technology used, etc.) or name the accounts to target.

Approach to ABM

- ☐ Bolt-On ABM
- ☐ ABM Lite (10-100 accounts)
- ☐ 1:1 ABM (1-10 accounts)
- ☐ Programmatic ABM (100-1000 accounts)

Attributes

- ☐ Industry: _____
- ☐ Company size: _____
- ☐ Revenue: _____
- ☐ Product interest: _____
- ☐ Current technology: _____
- ☐ Competitor's customer: _____
- ☐ Other: _____

_____

_____

OR

Named Accounts (1:1 ABM Only)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Number of Target Accounts:

_____

PIPELINE VELOCITY: WAKE THE DEAD CAMPAIGN PLANNING

Expand Within Accounts

Who are the personas you will engage within your target accounts?

Buyer Personas

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

Target Number of Contacts Per Account: _____

Consider the number of individuals in a typical customer's buying committee

Accounts + Persona = Audience

Craft Your Message

What is the overarching message you want your audience to take away from the campaign? How will you reengage these cold opportunities? Consider your audience's pain points and how long it's been since they've engaged with your company.

_____

_____

_____

PIPELINE VELOCITY: WAKE THE DEAD CAMPAIGN PLANNING

Create Content

What are the key pieces of content and creative you'll need to leverage or create for this campaign? Common assets for wake the dead campaigns include case studies, 1:1 personalized videos, digital ads, slide decks, and direct mail pieces.

_____ _____ _____

_____ _____ _____

_____ _____ _____

Choose Channels & Tactics

- ☐ Marketing emails
- ☐ Sales emails
- ☐ Phone calls
- ☐ Personalized videos
- ☐ Website personalization
- ☐ Custom content
- ☐ Direct mail
- ☐ Social selling
- ☐ Account-based ads
- ☐ Retargeting
- ☐ In-person events
- ☐ Webinars & virtual events
- ☐ Other _____
- ☐ Other _____

Orchestrate

Use the **Campaign Orchestration Planning Template** to map out every step of your ABM campaign, from first marketing touch to Sales engagement and beyond. Remember, you can use a wake the dead play as a standalone campaign or in conjunction with other plays for a more complex campaign that spans the customer lifecycle.

WORKSHEET > 6.1

CUSTOMER MARKETING: UPSELL/CROSS-SELL CAMPAIGN PLANNING

Campaign Name _____

Campaign Purpose

Increase renewal rates and contract values of your current customer base

Stage of the Customer Journey

☐ Demand Generation ☐ Pipeline Velocity ☑ **Customer Marketing**

KPIs

Leading Indicators of Success

- Account engagement levels
- Ad impressions
- Length of time ads and content are viewed
- Website visits
- Coverage – number of contacts reached within the account
- Awareness

Lagging Indicators of Success

- Annual/monthly recurring revenue (ARR/MRR)
- Average contract value (ACV)
- ROI

CUSTOMER MARKETING: UPSELL/CROSS-SELL CAMPAIGN PLANNING

Identify: Select Best-Fit Accounts

Define your target accounts list for this campaign. Either describe the attributes you'll use to define your segment of customer accounts (industry, company size, technology used, etc.) or name the accounts to target. 1:1 ABM is the most common approach to upsell/cross-sell campaigns.

Approach to ABM

- ☐ Bolt-On ABM
- ☐ ABM Lite (10-100 accounts)
- ☐ 1:1 ABM (1-10 accounts)
- ☐ Programmatic ABM (100-1000 accounts)

Attributes

- ☐ Industry: _____
- ☐ Company size: _____
- ☐ Revenue: _____
- ☐ Product interest: _____
- ☐ Current technology: _____
- ☐ Competitor's customer: _____
- ☐ Other: _____

_____

OR

Named Accounts (1:1 ABM Only)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Number of Target Accounts:

_____

WORKSHEET > 6.3

CUSTOMER MARKETING: UPSELL/CROSS-SELL CAMPAIGN PLANNING

Expand Within Accounts

Who are the personas you will engage within your target accounts?

Buyer Personas

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

Target Number of Contacts Per Account: _____

Consider the number of individuals in a typical customer's buying committee

Accounts + Persona = Audience

Craft Your Message

What is the overarching message you want your customers to take away from the campaign? What benefits of your solution will you highlight based on the customers' product usage, pain points, attributes, and budget? How will you prove the value of upgrading or purchasing an additional product/service?

_____

_____

_____

_____

CUSTOMER MARKETING: UPSELL/CROSS-SELL CAMPAIGN PLANNING

Create Content

What are the key pieces of content and creative you'll need to leverage or create for this campaign? Common assets for upsell/cross-sell campaigns include product webinars, video demos, video testimonials, case studies, and proof of ROI.

_____ _____ _____ _____

_____ _____ _____ _____

_____ _____ _____ _____

Choose Channels & Tactics

- ☐ Emails (Marketing & Customer Success)
- ☐ Phone calls (Customer Success)
- ☐ Website personalization
- ☐ Custom content
- ☐ Account-based ads
- ☐ Events
- ☐ Retargeting
- ☐ Webinars
- ☐ Other _____
- ☐ Other _____

Orchestrate

Use the Campaign Orchestration Planning Template to map out every step of your ABM campaign, from first marketing touch to Customer Success engagement and beyond.

CUSTOMER MARKETING: ADOPTION

Campaign Name _____

Campaign Purpose

Increase product adoption and usage at your customer accounts by empowering customers to get more out of your solution

Stage of the Customer Journey

- ☐ Demand Generation
- ☐ Pipeline Velocity
- ☑ **Customer Marketing**

KPIs

Leading Indicators of Success

- Account engagement levels
- Ad impressions
- Length of time ads and content are viewed
- Website visits
- Coverage – number of contacts reached within the account
- Awareness

Lagging Indicators of Success

- Number of users per account
- Engagement with your product
- ROI

CUSTOMER MARKETING: ADOPTION

Identify: Select Best-Fit Accounts

Define your target accounts list for this campaign. Either describe the attributes you'll use to define your segment of customer accounts (industry, company size, technology used, etc.) or name the accounts to target.

Approach to ABM

- ☐ Bolt-On ABM
- ☐ ABM Lite (10-100 accounts)
- ☐ 1:1 ABM (1-10 accounts)
- ☐ Programmatic ABM (100-1000 accounts)

Attributes

- ☐ Number of end-users _____
- ☐ Engagement with your product _____
- ☐ Company size: _____
- ☐ Revenue: _____
- ☐ Other: _____ _____

OR

Named Accounts (1:1 ABM Only)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Number of Target Accounts:

_____

CUSTOMER MARKETING: ADOPTION

Expand Within Accounts

Who are the personas you will engage within your target accounts?

Buyer Personas

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

Target Number of Contacts Per Account: _____

Consider the number of individuals in a typical customer's buying committee

Accounts + Persona = Audience

Craft Your Message

What is the overarching message you want your customers to take away from the campaign? What benefits of your solution will you highlight to get your audience excited about your product?

_____

_____

_____

_____

CUSTOMER MARKETING: ADOPTION

Create Content

What are the key pieces of content and creative you'll need to leverage or create for this campaign to empower your customers to use your product? Common assets for product adoption campaigns include implementation guides, worksheets, tutorials, product webinars, video testimonials, case studies, and proof of ROI.

_____ _____ _____ _____

_____ _____ _____ _____

_____ _____ _____ _____

Choose Channels & Tactics

- ☐ Customer success emails
- ☐ Phone calls from Customer Success
- ☐ In-app notifications
- ☐ Website personalization
- ☐ Custom content
- ☐ Account-based ads
- ☐ Retargeting & social media ads
- ☐ Webinars
- ☐ In-person/online strategy sessions
- ☐ Other _____
- ☐ Other _____

Orchestrate

Use the **Campaign Orchestration Planning Template** to map out every step of your ABM campaign, from first marketing touch to Customer Success engagement and beyond.

WORKSHEET > 8.1

CUSTOMER MARKETING: LAND & EXPAND CAMPAIGN PLANNING

Campaign Name _____

Campaign Purpose

Drive more business from complex, usually enterprise-level customer accounts by expanding to additional departments or subsidiaries at those companies

Stage of the Customer Journey

- ☐ Demand Generation
- ☐ Pipeline Velocity
- ☑ **Customer Marketing**

KPIs

Leading Indicators of Success

- Account engagement levels
- Ad impressions
- Length of time ads and content are viewed
- Website visits
- Coverage – number of contacts reached within the account
- Awareness

Lagging Indicators of Success

- Sales qualified/accepted accounts (SQAs/SAAs) generated
- Meetings/calls/demos set
- Length of the sales cycle
- Pipeline generated
- Closed-won deals
- ROI
- ARR/MRR at the company level

CUSTOMER MARKETING: LAND & EXPAND CAMPAIGN PLANNING

Identify: Select Best-Fit Accounts

Define your target accounts list for this campaign. Either describe the attributes you'll use to define your segment of customer accounts (industry, company size, technology used, etc.) or name the accounts to target.

Approach to ABM

- ☐ Bolt-On ABM
- ☐ ABM Lite (10-100 accounts)
- ☐ 1:1 ABM (1-10 accounts)
- ☐ Programmatic ABM (100-1000 accounts)

Attributes

- ☐ Industry: _____
- ☐ Company size: _____
- ☐ Revenue: _____
- ☐ Product interest: _____
- ☐ Current technology: _____
- ☐ Competitor's customer: _____
- ☐ Other: _____

_____

_____

OR

Named Accounts (1:1 ABM Only)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Number of Target Accounts:

_____

CUSTOMER MARKETING: LAND & EXPAND CAMPAIGN PLANNING

Expand Within Accounts

Who are the personas you will engage within your target accounts?

Buyer Personas

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

Target Number of Contacts Per Account: _____

Consider the number of individuals in a typical customer's buying committee

Accounts + Persona = Audience

Craft Your Message

What is the overarching message you want your customers to take away from the campaign? What benefits of your solution will you highlight to prove value and get your audience excited about your product?

_____

_____

_____

_____

CUSTOMER MARKETING: LAND & EXPAND CAMPAIGN PLANNING

Create Content

What are the key pieces of content and creative you'll need to leverage or create for this campaign to land and expand at current customer account? Common assets for expansion campaigns include video testimonials, case studies, use cases, and proof of ROI — especially as they relate to your target accounts' colleagues' success with your solution.

_____ _____ _____ _____

_____ _____ _____ _____

_____ _____ _____ _____

Choose Channels & Tactics

- ☐ Marketing emails
- ☐ Sales emails
- ☐ Phone calls
- ☐ Personalized videos
- ☐ Website personalization
- ☐ Custom content
- ☐ Account-based ads
- ☐ Social selling
- ☐ Retargeting
- ☐ Product Webinars
- ☐ Direct mail
- ☐ Other _____
- ☐ Other _____

Orchestrate

Use the **Campaign Orchestration Planning Template** to map out every step of your ABM campaign, from first marketing touch to Customer Success engagement and beyond.

DEFINING YOUR IDEAL CUSTOMER PROFILE

To define your ideal customer profile (ICP), have your sales, marketing, and customer success teams sit down and review what makes a company successful with your product or service.

Part 1: Named Accounts

Create a list of customers that have been exceptionally successful with your solution.

In a perfect world, which companies would you like to turn into customers?

DEFINING YOUR IDEAL CUSTOMER PROFILE

Part 2: Characteristics of Your Ideal Customers

Look at the customers and target accounts you named above. What characteristics do they have in common that make them a good fit?

Industries/verticals	
Size	**Geography**
Budget	**Annual revenue**

Other Factors to Consider

- Technology they use
- Number of employees in a particular department
- Size of their customer base
- Level of technology maturity

NOTES

DEFINING YOUR IDEAL CUSTOMER PROFILE

Part 3: Define Your ICP

Now it's time to put all this information together and define your ideal customer profile.

Example: Our ideal client is a B2B SaaS company in the U.S. or Canada that has a customer service team of at least 10 people and ARR of at least $20 million. Their customer base is made up of small and medium businesses that require significant hands-on training and support.

WORKSHEET > 10.1

IDENTIFYING BUYER PERSONAS

Use this worksheet to identify your buyer personas: the people your sales and marketing teams engage with directly during the sales process. You'll need to define the job description, role, and responsibilities of each contact you want to target within your ideal customer profile as well as challenges they face and how your product or service will help solve those challenges.

Because most B2B purchases are made by a buying committee, make sure you fill out this worksheet for each of your buyer personas.

Job title	
Reports to	
Role in the purchase decision (select all that apply)	☐ End user ☐ Key influencer ☐ Decision-maker ☐ Buyer ☐ Other: _____
Objectives & goals	1. _____ 2. _____ 3. _____ 4. _____ 5. _____

IDENTIFYING BUYER PERSONAS

KPIs	1. _____ 2. _____ 3. _____ 4. _____ 5. _____
Pain points & challenges	1. _____ 2. _____ 3. _____ 4. _____ 5. _____
Relevant value proposition & messaging	1. _____ 2. _____ 3. _____ 4. _____ 5. _____

IDENTIFYING BUYER PERSONAS

Common objections	1. _____ 2. _____ 3. _____ 4. _____ 5. _____
Talking points	1. _____ 2. _____ 3. _____ 4. _____ 5. _____

CONTENT MAPPING

	Buyer's Journey		
	Demand Generation	**Pipeline Velocity**	
Stage	Prospect	Opportunity	Customer
Goal	Lead to qualified account	MQL/MQA to Opportunity	Opportunity to customer
Content	**Blog posts:** 1. _____ 2. _____ 3. _____ **E-books/white papers:** 1. _____ 2. _____ 3. _____	**Webinars**: 1. _____ 2. _____ 3. _____ **Video testimonials:** Customer: _____ Customer: _____ Customer: _____ **Customer case studies:** Pain point: _____ Case study: _____ Pain point: _____ Case study: _____ Pain point: _____ Case study: _____	☐ Video testimonials ☐ Customer case studies ☐ Competitive analysis **"How-to" resources:** 1. _____ 2. _____ 3. _____ **Proof of ROI:** ☐ ROI calculator ☐ Aggregate customer data ☐ Industry data ☐ Case studies

WORKSHEET > 11.2

CONTENT MAPPING

	Customer's Journey			
Stage	**Adoption**	**Cross-Sell/Upsell**	**Land & Expand**	**"Always On" Air Cover**
Goal	**Customer to advocate**	**Winning new business**	**Winning more business**	**Keeping top-of-mind**
Content	☐ Implementation guide ☐ Tutorials ☐ Knowledge base **How-to resources:** 1. _____ 2. _____ 3. _____	☐ Product webinar ☐ Video testimonials ☐ Customer case studies ☐ Proof of ROI	☐ Video testimonials ☐ Customer case studies ☐ Proof of ROI	☐ Quarterly reports ☐ Newsletter **Thought leadership themes:** 1. _____ 2. _____ 3. _____

Terminus
Account-Based Marketing

To learn more about account-based marketing visit: terminus.com