

Worksheet

Orchestrate a Smarter Omni-Channel Campaign

Campaign Name:

Date:



As a B2B marketer, you lack no creativity in reaching out to your target accounts across multiple channels and tactics.

The key is to apply your Smarter Go-To-Market™ lens to everything you do. You'll want to orchestrate each interaction across channels to deliver a cohesive account experience.

Reference this worksheet before you launch your next omni-channel campaign to ensure you are set up for success and aligned with your team on target metrics.

Before you run the campaign, get the foundation in order.

- Set clear goals
- Identify the stages of the journey you are targeting
- Identify accounts
- Identify contacts
- Align marketing and sales and get buy-in
- Derive account insights



Define what success means for the campaign.

How do you define campaign success?

What are your KPIs?

What software will measure performance?

What stage of the funnel are you targeting?

What's your budget?

What are your timeline and milestones?

Build your audiences using segmentation.

You can narrow the focus of your audiences using any combination of data and Account Intelligence you have available. You can create segments of audiences that you want to include or suppress from your campaign.

Segment 1

Segment 2

Segment 3

Segment 4

Segment 5

Examples:

Simple segmentation: Customers in the healthcare industry

Advanced segmentation: Prospects showing high web engagement who use Google Analytics, are based in the US, and have downloaded three ebooks in the last 6 months

Prioritize your audiences.

Once you've built your audiences, you can rank them from high to low priority and focus on creating personalized resources based on their priority level.

Tier 1

Tier 2

Tier 3

Lower priority accounts might be great for one-to-few or one-to-many personalized ABM campaigns, while one-to-one marketing methods can be reserved for your highest priority accounts.

Identify the types of resources channels you want to allocate to each tier.

Tip: Use an account scoring model to map accounts to the different tiers.

	Include (Y/N)	Custom site content	Chat	Direct mail	Social media	Deal nurture	Executive support	Account plans	Marketing emails	Webinars	Field events
Tier 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tier 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tier 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Who are the stakeholders of the campaign?

Demand Generation

Digital Marketing

Field Marketing

Marketing Operations

Sales/Sales Development

Sales Enablement

Other

For each tier, outline each touchpoint, including key features like the channel, call to action, and team members involved.

Touch

1

Channel

CTA

Technologies involved

Personalization

Notes

Who:

Your team

Target personas

Owner

Touch

2

Channel

CTA

Technologies involved

Personalization

Notes

Who:

Your team

Target personas

Owner

For each tier, outline each touchpoint, including key features like the channel, call to action, and team members involved.

Touch

3

Channel

CTA

Technologies involved

Personalization

Notes

Who:

Your team

Target personas

Owner

Touch

4

Channel

CTA

Technologies involved

Personalization

Notes

Who:

Your team

Target personas

Owner

For each tier, outline each touchpoint, including key features like the channel, call to action, and team members involved.

Touch

5

Channel

CTA

Technologies involved

Personalization

Notes

Who:

Your team

Target personas

Owner

Here is an orchestrated play for Tier 1 accounts. It includes advertising, direct mail, email, phone, and social media tactics, building in personalization as the account's engagement grows. Be flexible. You can always skip or replay steps depending on the success of each interaction.



Unlimited automations across channels. Precisely segmented audiences at your fingertips. Customer data management.

Is this all music to your ears?

Get all of this and more with **ABX Cloud Orchestration.**