

EBOOK

The Definitive Guide to Choosing an Account-Based Marketing Platform

Scouting for a suitable ABM solution?

This guide outlines what to look for,
so you can choose the right vendor
for your B2B go-to-market strategy.



DEMANDBASE

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INTRODUCTION

Account-Based Marketing in Today's World

INTRODUCTION

Account-Based Marketing in Today's World

As ABM adoption has skyrocketed, companies are looking to invest in technology to help automate, scale, and accelerate their overall initiatives.

Given the ever-growing list of technology vendors, it's become more difficult than ever to pinpoint and invest in the right ABM solution that addresses the entire customer journey. But we're here to help!

If you're scouting for a suitable ABM solution, the questions and criteria in this guide (referencing everything from email/calendar logging, lead to account matching, data cleansing, and more) can help steer your thinking, whether you are just getting started or looking to take your account-based experience to the next level. And because you want to select the right solution and hit the ground running with it, it's a good idea to evaluate vendors using the framework of **Build, Find, Engage, Close, and Measure** and reap the benefits of this methodology from the beginning.

[Let's explore these processes and see exactly how they can empower you to find the right solution for your business.](#)



Framework for ABM



Build
your account-
based
foundation



Find
and prioritize
target accounts
with AI-driven
models and
intent data



Engage
with accounts
and people via
orchestrated
plays across
channels



Close
deals and
expand
relationships
by aligning
with sales



Measure
engagement
across the
buyer journey

INTRODUCTION

5 Steps to Account-Based Marketing

Build

- The first step in creating your account-based experience is to build an account-based foundation. This starts with creating a single view of all your account data so marketing and sales can act as one team. It's important to find a vendor that can connect your different sources of first party data and third party data in one platform so you can create account and people lists and segment your market.

Engage

- A core component of an account-based experience is ensuring you are engaging accounts along the buyer journey, from awareness to post sale. It's important to find a vendor who can help you target accounts with unique experiences along the buying journey. Whether it's advertising to your target accounts or orchestrating cross-channel plays, having an account-based lens throughout this experience ensures you are targeting the right accounts with the right message.

Measure

- Getting insights on accounts and campaigns along the buyer journey is paramount to a successful account-based strategy. If you can find a vendor that helps you measure performance in one place, that makes it even easier to manage your program.

Find

- While having a sales and marketing agreed upon target account list (TAL) is a good step toward account-based marketing, a TAL does not account for all of the accounts that may be in-market for your product or service. That's where predictive analytics and intent come into play. Using AI, machine learning, and intent helps you discover both known and unknown accounts that may be ready to buy.

Close

- Once you've engaged accounts along the buyer journey, it's time to win those deals. Sales insights that help you understand what accounts are researching, who has engaged with your content, and give you information on the people and messages to use at those accounts are recipes for success.

INTRODUCTION

Wait! There's one more thing ...

Vendor onboarding and support

Once you have mapped out how using the five processes as a reference can help you land your dream ABM solution, it's just as important to closely evaluate the support offerings of your preferred vendor options. Every provider has different levels of support and pricing tiers that will be key in the success of your deployment. If your top vendor options are neck and neck in terms of the features, the tiebreaker differentiator might be in this area.

As you look through vendor offers, they might offer a specific amount of hours for each phase or increased prioritization, like in this example:

	Basic	Premier
Implementation Support	6 hours	10 hours
Product Support	<ul style="list-style-type: none">▸ 24/7 access to submit and view help requests via the Success Center▸ Standard support SLAs	<ul style="list-style-type: none">▸ 24/7 access to submit and view help requests via the Success Center▸ Standard support SLAs▸ Priority ticket handling
Professional Services	10 hours	20 hours

*this example is just for reference and not specific to any vendor

PART 1

Build an Account-Based Foundation

Build an Account-Based Foundation

Any account-based effort must begin with creating a single view of all your account data shared across marketing and sales. A prospective ABM solution that is part of an account-based experience (ABX) strategy needs to effectively:



Why does it matter?

Often times, the misalignment between sales and marketing happens because both teams are looking at data in different systems, in different ways. A solution that can connect disparate sources of data for one view of an account ensures that both sales and marketing are looking at the same set of data.



Having access to all of your 1st and 3rd party data in one platform also helps you filter and segment your target account list based on specific activities, intent, website engagement, firmographics, and technographics. There's no limit to the types of account and audience lists you can create when all of your data is one place.

There's also something to be said for productivity and time savings. Not many vendors out there can combine different data objects into one list without hours of Excel exports and manipulation. Finding a vendor that can combine different data objects into one list will not only save you endless manual work but allow you to scale your programs faster.

Finally, let's talk about the importance of data accuracy and hygiene. While quantity of data is an important metric, the quality of that data is even more important when building an account-based foundation. The insights you derive and actions you take from those insights are pointless if the data is inaccurate. Make sure to question vendors about the quality of their data by understanding their data sources, data collection methodology, and data hygiene practices. If you need help with data hygiene, some ABM vendors offer solutions to help clean data in your CRM systems. For example, check out [Data Integrity](#) from Demandbase.

Segment Management

Connect disparate data sources and manage audiences

To foster the integration of your marketing and sales teams, creating a single view of all your account data is imperative. As you go through your vendor selection process, make sure the solution can:

- Connect with CRM.
- Connect with your marketing automation platform.
- Let you upload any list.
- Create a single view of target accounts, people, and activity data.
- Enable you to easily use your audiences to execute via other channels like email campaigns, direct mail, advertising, or website personalization.
- Allow for segmentation across different object types like accounts, people, opportunities, and activities in one list.

With all of these bases covered, some additional features to look for include the ability to:

- Expose additional data related to the accounts in your audience, including firmographic, technographic, intent, and engagement activity.
- Allow you to easily filter your audience by first and third party attributes like firmographics, technographic, intent, and site activity (and can those filtered audiences be saved?).
- Further refine and segment existing campaign, audience, or automation lists.

PART 1

Data Insights and Management

Get trusted data
and intelligence
about accounts and
contacts in one place

As you build your account-based foundation, (whether manual or predictive), there are many types of data to take into account, including technographics, firmographics, types of intent, interactions, etc. Different data providers source their information using a variety of techniques. Pay attention to the differences to ensure the data meets your business needs. When researching your options, these questions/criteria can help streamline your selection process. Does the vendor:

Get accurate company information including financials, employee counts, industries, and locations?

- Identify and deanonymize the account of any visitor on any webpage?
- Power your applications with API access to their data?
- Clean, unify, and visualize your CRM data with reliable, up-to-date data management?
- Provide proprietary intent data sourced using AI and natural language processing?

When looking at bringing data into your organization, you need to be sure to have a plan for how to operationalize it. Once you are certain that you will have accurate data (with quality of source and context), you should dig deeper and find out if they also:

- Identify decision-makers at target accounts?
- See into a company's current tech stack and future technology needs?
- Predict what technologies a company will purchase next?

PART 2

Find In-Market Accounts

Find In-Market Accounts

While the criteria for an MQL has been sufficient for the past few years, ABX behooves you to take into account one key aspect about your prospect: their readiness and desire to hear from you. It's a magical moment that every sales and marketing person strives to find. The F.I.R.E. acronym (a great framework for combining predictive analytics with specific business rules to select evergreen and triggered accounts) can help.



There is a lot of important information that can't be summarized here, so we recommend taking a look at [The Clear & Complete Guide to Smarter GTM™](#) for the extended explanation.

Why does it matter?

Finding in-market accounts is as much an art as it is a science. The science part of it is based on using past opportunities and activities to build models that identify accounts likely to become an opportunity. The art part of it is in selecting the right inputs to those models. These inputs should be based on what's important to your business and how you would define your ideal customer profile (ICP). A vendor that allows you to customize your predictive models based on specific inputs is putting your organization's interest first. Transparency here is the key.



As mentioned, the acronym FIRE is a great framework for understanding when an account is in-market for your solution. **F stands for Fit**, which is often referred to as your ideal customer profile. You want a predictive model that helps you find more of your ICP. **I stands for Intent**, which is the behavioral signals that help identify when an account is in market for your product or service. **R stands for Relationship** which is the context and history you have with the account. Finally **E stands for Engagement** which is the time spent with

your company. Creating a predictive model around these elements ensures you are finding the best fit accounts who are in-market for your solution.

Once you've discovered accounts that are in-market, building a target account list (TAL) is the next step. Being able to build an account list from different selection criteria across different object types not only saves you time but also gives you a granular level of segmentation for any campaign type. Review the next section on account selection to identify features important in creating an account list.

PART 2

Predictive Analytics

A combo of intent, AI, and machine learning to power your ABM

Predictive analytics takes data about accounts that have progressed to a certain stage of the buying process and uses it to find other accounts that look most like them. Combining firmographics and technographics with predictive analytics can provide a more accurate representation of which accounts in your tier lists are actually ready and interested in your offering. **As you delve into the technical analysis of the predictive capabilities of your ABM solution RFPs, ask yourself – does the vendor:**

- Allow you to customize and build models and scores that predict the likelihood of a sales opportunity?
- Have multiple models to predict opportunities for multiple product lines or business units?
- Allow you to customize and build models and scores to identify your target customer profile?

With analytics being such a hot topic, a number of vendors could be offering all of these options. The key differentiator in this instance might be all about timing. How fast can each of your vendor options run their predictive analytics capabilities? Can any of them quickly build and train their predictive models to get you up and running in 24 hours?

PART 2

Account Selection

Build dynamic target account lists that include the right accounts

You can't be account-based if your systems are still built around the lead (as traditional marketing systems are). When researching your options, these questions/criteria can help streamline your selection process. **Does the vendor:**

- Identify accounts based on a variety of data, including firmographic, technographic, behavioral, and intent signals?
- Go beyond company-level firmographics to understand individual buyers at key accounts?
- Score, rank and provide insights into existing, known accounts?
- Help identify accounts outside of your existing CRM data?
- Leverage AI technologies to identify buying signals in real-time?
- Use segmentation defined in the account selection environment to drive site customization?
- Customize account stages to your specific business needs?
- Enable cross-sell and upsell through post-sales account stages?

Take things further and look ahead to find out if they also:

- Provide direct activation into marketing channels from the target account list?
- Enable sales intelligence alerts based on audiences created in the account selection environment?
- Enable an engagement model for individuals that measures known activity?

PART 3

Engage Accounts

Why Does it Matter?

Now that you've built your account-based foundation, discovered accounts in-market for your solution and created your target account lists, the marketing part of account-based marketing comes in. Vendors who can seamlessly target accounts on your list, and engage them through different channels in one platform, get you closer to an account-based experience (ABX). Because not only are you using first and third party data to inform your account lists, you're also leveraging connections to different channels from the same platform to ensure a customer's buying journey is seamless.



From an advertising standpoint, it's important to select an ABM vendor who uses a B2B DSP. Check out this [blog](#) for the important differences between a B2B and B2C DSP. One of the key differences is that a B2B DSP can help to balance impressions across your target accounts.

Another factor to consider in ABX is presenting your prospect or customer with the right message at the right time. That's where website personalization comes into play. Make sure to evaluate vendors for their ability to create unique experiences based on the stage of the buyer journey. Having a dynamic list and

creating unique experiences for different audiences ensures you are always presenting the right message at the right time. You can learn more about the importance of segmentation and customized experiences in this [blog](#).

Finally, what is account-based marketing without marketing and sales plays? Luckily, many ABM vendors have moved beyond being a point solution to being a more holistic solution that encompasses multi-channel orchestrations. Through connections to sales engagement, advertising and marketing platforms, both sales and marketing teams alike can easily engage their audiences.

Advertising

Run targeted advertising campaigns that reach the right individuals and accounts

Now that you know how your ABM solution can help you research and reach your target accounts, it's time for you to actively get out there and make sure they see the messages you've prepared for them. As you evaluate your vendor options, these questions/criteria can help streamline your selection process. **Does the vendor:**

- Use a purpose-built B2B DSP to target B2B accounts?
- Run campaigns that target key accounts, and buying committees within those accounts, and optimize bids based on their intent?
- Protect brand safety through mechanisms such as whitelists?
- Provide transparency into its targeting data, its sources, and how it is derived?
- Offer dynamic ad creative that is responsive to company, industry, and other attributes at the impression level?
- Target advertising using a combination of IP, cookie, and first party data?
- Leverage AI to manage frequency caps and budgets appropriately and optimize bids for the right users at the right accounts more evenly?

- Offer named account service personnel to partner with you from strategy through execution?

But it doesn't stop there. To ensure the best possible outcome for you and experience for your customers, find out if they also:

- Offer transparency with its whitelist?
- Provide campaign delivery reporting at the domain level?
- Allow you to serve personalized ads on an anonymous basis?
- Provide reporting using B2B metrics?
- Support the creation of advertising campaigns directly from account lists and filtered account list audiences?

Website Personalization

Deliver personalized website experiences and surface content based on individual visitors

We spend a lot of time and money driving visitors to our websites. But the game is far from over once they arrive. In ABX, you need to turn visits into engagement – and nothing beats a personalized experience. Using web personalization technology, you can identify the company and industry that a visitor belongs to, then serve up images, case studies, and offers targeted to that account or industry.

Take a look at your ABM solution options in detail and ensure that the vendor can:

- Identify known and anonymous visitors.
- Personalize headlines, website heros, CTAs, promos all on a single webpage.
- Allow you to create multiple web page experiences for different stages of the customer journey.
- Use web forms for lead enrichment.
- Use dynamic lists and segmentation to ensure your accounts are always getting the right experience at the right time.

As an added bonus, does the vendor also:

- Let you build customizable, personalized experiences for known and unknown visitors?
- Support integrations with related platforms like CMS and A/B testing platforms?

Orchestration

Orchestrate account engagement across channels

Done correctly, marketing orchestration ensures all the moving parts in an ABX play work together to achieve your business goals at a target account. A key component of orchestration is combining different channels and different people from various departments. A multi-channel approach spreads your risk and increases your chance of a response. Evaluate each of the proposals in front of you on the basis of the following criteria.

Does the vendor:

- Dynamically move accounts/people into specific email campaigns based on trigger points?
- Automatically change lead/contact status within CRM campaigns?
- Automate the creation of CRM tasks?
- Define the segment based on all available data from across CRM/MAS/Inbox activities?
- Automatically change/update people/account/opportunity data within CRM based on rules?
- Automatically add/remove people from marketing automation/sales engagement/CRM campaigns?

Beyond these features, a good ABM solution should also allow you to:

- Dynamically move accounts into specific advertising campaigns based on trigger points.
- Offer advanced/recurring scheduling options.

PART 4

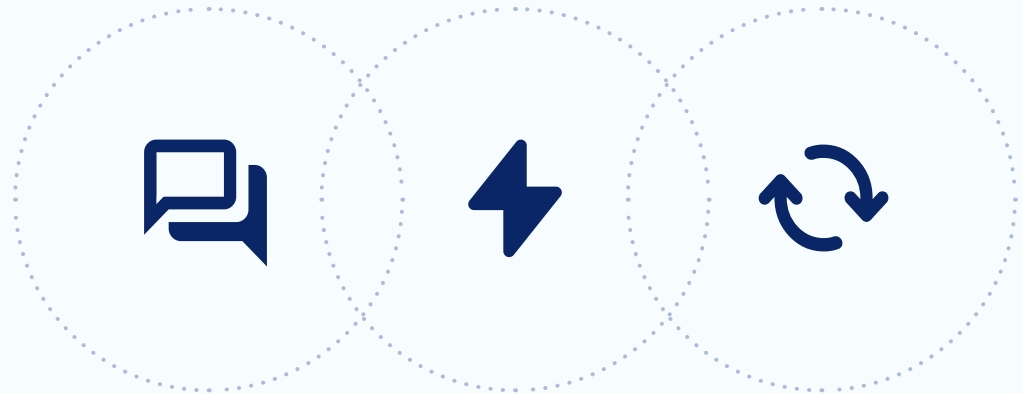
Close Accounts



PART 4

Close Accounts

Closing on a marketing effort requires near-perfect alignment between the teams and delivering a consistent message to the prospect while providing an enjoyable experience. Achieving this feat relies on companies successfully navigating three levels of maturity:



Communication

Activation

Orchestrations

Why does it matter?

From building an account-based foundation to engaging accounts, one consistent theme is ensuring that marketing and sales is aligned across the account journey. Why? Account-based marketing is not just for marketers. Sales is a key team member in ensuring a successful ABM and ABX strategy. After all, closing accounts and winning business relies heavily on your sales team.



That's why sales intelligence is one of the most important aspects to evaluate with an ABM vendor, meaning: having a complete understanding of the type of sales insights they provide, and how actionable they are. Insights from trending or high intent give you an idea of the type of messages to use to cater your sales outreach. Information on corporate relationships and hierarchies help you understand when more than one buying committee from an organization is engaged. News about prospects helps you devise your communication strategy. Understanding which people at an account are the most engaged helps you see where there are gaps in your multi-threaded approach.

Of course, there's a lot a sales rep can do with the right insights delivered to them at the right time. This is where an evaluation of delivery mechanisms and sales alerts becomes important. Real-time sales insights through Slack, for example, helps sales be incredibly responsive as prospects are searching on their website. A browser extension can help sales take action from any website they are visiting. And of course, all of these insights delivered where sales likes to work, like their CRM, saves time and makes them more productive and efficient. In short, sales Intelligence delivered at the right time can make a huge impact in achieving pipeline goals.

Sales Intelligence

Inform sales strategy with meaningful intelligence

To prevent a disjointed experience for the customer where sales and marketing aren't aligned as they should be, ABX transformed the "baton-pass" nature of the interactions between sales and marketing into an orchestrated approach and process. Making sure your prospective ABM solution meets all required levels of alignment (communication, activation, and orchestration) will ensure a smoother customer experience and an integrated successful closing on an account.

To ensure you acquire the right solution, find out if the vendor can:

- Deliver sales insights in CRM, on a browser extension, email, and chat tools like Slack.
- Automatically log emails and calendar activities into the ABM platform.
- Provide intent, deal story, communication history, and people highlights all within CRM.
- Get the latest and most actionable news about prospects with curated news and social insights?

- Provide actionable sales insights that are customizable by sales rep.
- Build highly targeted lists of qualified prospects and customize your lists using dozens of filters, including news and keywords.
- Optimize account-based efforts by understanding how accounts relate to each other through corporate hierarchies.

Aside from the aforementioned criteria, the following points can help you solidify your decision to go with one provider over another. Does the vendor:

- Deliver sales insights in real-time or close to real-time?
- Deliver insights based on website engagement? If so, do they differentiate the type of visit?
- Make it easy for sales to take action on accounts and people in sales engagement platforms from the ABM platform?

PART 5

Measure Performance

PART 5

Measure Performance

ABX is about quality, not quantity. The traditional metrics that have been used to gauge ABM success are not useful in the experience-centric realm. The new and more complex benchmarks for measuring success revolve around:



**Relationship
Analytics**



**Journey
Analytics**



**Attribution
Analytics**

Why does it matter?

Once you've successfully closed accounts, you want to make sure you understand which ABM programs helped to contribute to that sale so you can rinse and repeat. This is where you can evaluate how a vendor measures ABM success and the entire account-based experience. You will want to choose a vendor who can help you optimize your programs from the top of the funnel to the bottom, and grow your customer's lifetime value.



Some examples of metrics to measure include the volume and velocity of an account as it makes its way through the buyer journey. This helps you understand whether your programs are engaging enough as well as whether your sales cycle is too long.

A strong ABM vendor will also have different methods for measuring attribution since not all businesses are alike, and marketers love seeing attribution models so they can measure the success of their marketing efforts and ROI.

Other metrics to consider include advertising campaigns and website visits – but with an account-based lens. After all, you want to understand whether your advertising is reaching the right accounts and which accounts are engaging on your website.

If you find you're short-staffed, some ABM vendors offer strategic services to help you with your ABM strategy and measurement. To learn more about vendor onboarding and support, read the next section.

Reporting and Analytics

Measure the performance of your ABM strategy

Because ABX has a different set of metrics than ABM, when it comes to measuring the performance of the ABM solution from the vantage point of the customer experience, the scope also changes.

The vendors on your shortlist should, among other features:

- Offer a dashboard to measure ABM impact from across the funnel.
- Track volume, velocity, and conversion metrics for each journey stage.
- Offer customizable subscriptions for all custom reports.
- People and account based heatmaps.
- Allow you to combine first party, third party, firmographic, and technographic data for segmentation and reporting.
- Allow you to compare the performance of different audiences or account lists and evaluate the impact of specific programs.

- Enable you to see the engagement and activities that influenced the different stages of a deal cycle.

Measuring a journey and a relationship in the long term requires measuring as much data as possible, so find out if they also:

- Centralize your existing data sources in one location?
- Track B2B metrics by account?
- Track and report on anonymous first-touch visitors by account?
- Have strategic services in place to help you set up ROI reporting based on your strategies?
- Allow you to compare different timeframes for account stages?
- Provide advanced BI capabilities for ABM?

PART 6

Vendor Onboarding Support

Why does it matter?

Having a top of the line solution is a great start, but the key to unlocking the possibilities of what it allows you to accomplish is knowing the level of support they will provide once the partnership begins.



To build the best experience for your prospects, leads, and accounts, you want a solution provider that meets your needs not just during deployment, but beyond.

Can the vendor support you through different levels of your ABM's strategy maturity?

As you can tell from this buying guide, there's a lot to consider when it comes to evaluating ABM vendors. However, evaluating the platform alone is not enough. For example, if you're new to account-based marketing, you may be looking for some help in starting out with a simple ABM

strategy. If you're more advanced, you may be looking for help to bring your ABM to the next level.

You should consider whether the vendor can help with the different maturity levels of an ABM program. Can the vendor provide you with enough resources to support your team? Can the vendor support you with technical or strategic consulting? How much can you learn from the ABM vendor? Wherever you are in your ABM journey, the amount of vendor onboarding and support available should also be considered in your evaluation.

Vendor Onboarding and Support

Get up and running and start delivering value quickly

When researching your options, these questions/criteria can help streamline your selection process. Does the vendor:

- Provide on-demand and custom training sessions?
- Provide strategic ABM workshops, best practices, and thought-leadership materials?
- Offer strategic ABM support from seasoned marketers?
- Offer managed services for program optimization, reporting, insights, and operational enablement?
- Offer ABM certification courses?
- Offer full day strategic workshops?
- Offer strategic support for custom reporting and analysis?

If your top vendor options check all of these boxes, you can dive even deeper and find out if they also:

- Deliver quick time to value?
- Conduct performance reviews on a quarterly basis?
- Provide relevant ongoing topical office hours?
- Offer technical consulting?

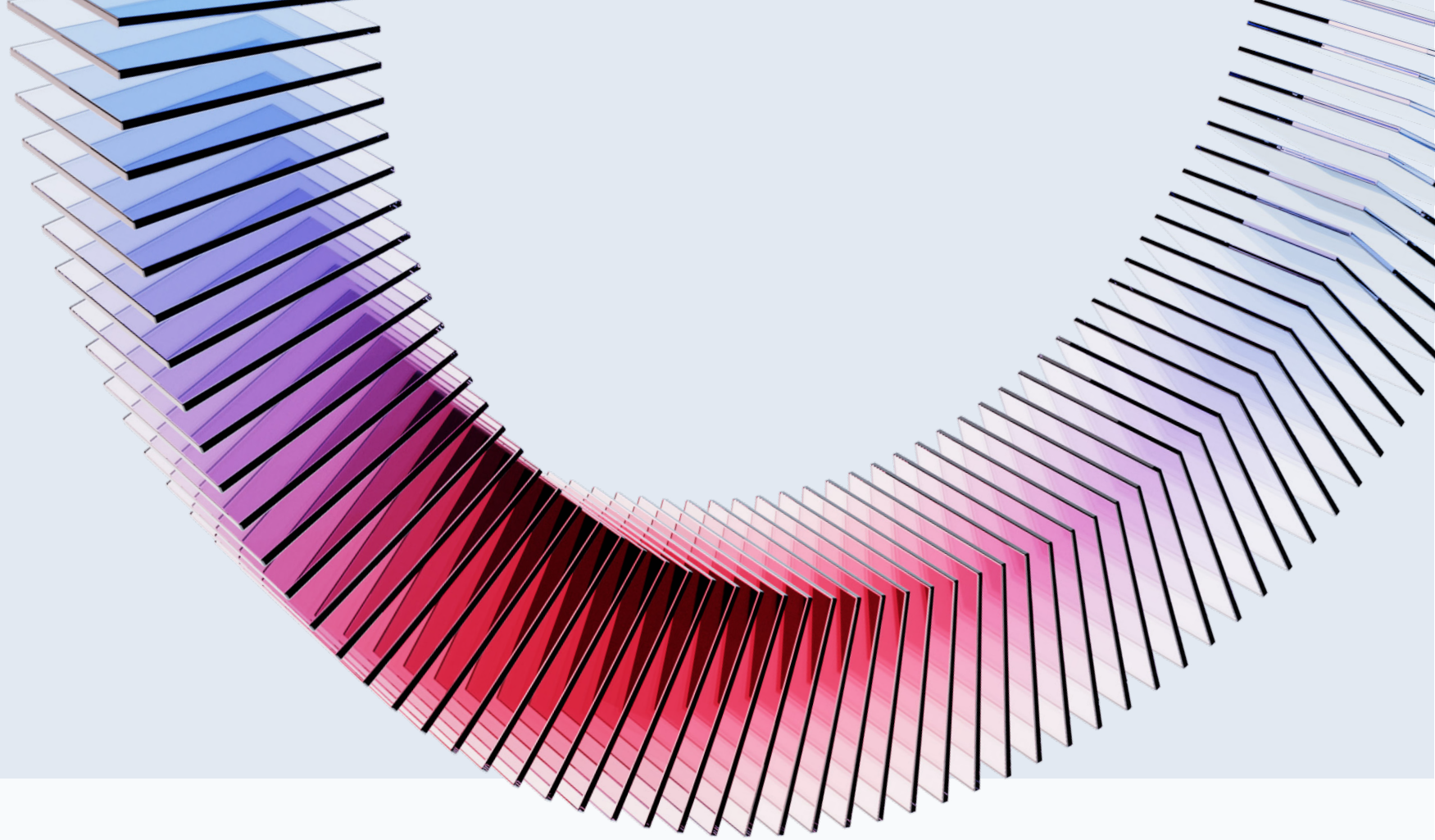
Software in the Era of Experience

Although technology sometimes has capabilities beyond what we know to use it for, this isn't always the case. For account-based marketing, it's very clear that just like with other industries and offerings, the key is the experience.

As you search for a solution that can help your business grow, remember the basic principles outlined in this guide and use this as a checklist to ensure that you'll be in good hands with both the software and the vendor. Every question and criteria outlined in the previous pages was compiled based on researched best practices and lived experiences within our own ecosystem.

When you lead with experience – and keep in mind the processes to Build, Find, Engage, Close, and Measure – you'll land in good hands and, most importantly, your customers will too.





DEMANDBASE

Demandbase is the leading account-based GTM platform for B2B enterprises to identify and target the right customers, at the right time, with the right message. With a unified view of intent data, AI-powered insights, and prescriptive actions, go-to-market teams can seamlessly align and execute with confidence. Thousands of businesses depend on Demandbase to maximize revenue, minimize waste, and consolidate their data and technology stacks - all in one platform.

For more information about how Demandbase can help you scale your GTM strategy, visit www.demandbase.com.

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