

EBOOK - TACTICLE GUIDE

The B2B Marketing & Sales Orchestration Playbook

Go beyond marketing automation.
Orchestration unites teams with
omni-channel campaigns across
the buyer journey.



DEMANDBASE

Selling in the Modern B2B World

(Many players. One heartbeat.)

It's official.

The buyer's world has gone digital. And there is no turning back.

Deloitte notes this phenomenon as “life on the cloud,” where, in 2020 (thanks to the Covid epidemic), the archetypal consumer's journey sharply shifted to a diverse world of online experiences like e-commerce, social networking sites, and live influencers.¹

B2B buyers have access to virtually every business solution on the planet. Dozens, if not hundreds, of solutions are just seconds away from a few strokes on their keyboards.

Every buyer — even B2B buyers, not just the B2C — wants a seamless, personalized experience. Think the likes of Netflix and Spotify (the usual suspects). What's more, B2B buyers expect bespoke buying experiences tailored specifically to their interests and needs that combine those digital experiences with traditional experiences like direct mail, phone calls, and live events.

But with the complex buying cycle of B2B, how do you, the B2B brand, provide the requisite custom experience for all of your target accounts? After all, the last thing you want to do is spam buyers with unwanted, irrelevant messages.



The answer lies in Demandbase Orchestration.

Demandbase Orchestration makes your go-to-market (GTM) strategy better by helping you get smarter about your outreach.

Because rich data and Account Intelligence fuel Demandbase One, you not only reach your contacts and accounts in a personalized way, but you reach the right accounts during the magical moments — at the right time in their journey. In other words, you apply next-level ABM, which considers every part of the buyer journey. We call it account-based experience (ABX).

By adding orchestration, you ensure that the moving parts in an ABX program are synchronized across your organization's customer-facing teams. So you all work in lock-step to ensure a buyer's experience is positive, consistent, and in context with the rest of the account.

Music to your ears, right?



So here's how this eBook can help.

We dig into how orchestration helps sales and marketing sell more effectively, some orchestration best practices, and how marketing teams can quickly set up Audiences and Automations using Demandbase Orchestration.

Plus, there's a whole section dedicated to actual orchestration plays, so if you're a campaign leader, you don't have to build them from scratch.

So where is your conductor's baton? Pick it up because it's time to start orchestrating!

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A brief history from automation to orchestration, or the old strategies kind of suck

Before we enter the orchestration world, let's (happily) look at all we'll leave behind.

As we are keenly aware, digital opportunities come with unique challenges when selling in the B2B world. With all the information available to our accounts, we need to find ways to be seen and stay relevant across complex buying cycles. Across our marketing, sales, and customer teams, we're all eager to do our part to win over the next happy customer.

Over the years, our tactics have (thankfully) improved. Let's explore.



The Advent of Marketing Automation

At the turn of the century (wow, most of us can actually say we've been around to see a century turn!), campaign management tools like Xchange came onto the scene. Marketing teams could use this new software to streamline direct mail and eventually email campaigns.

We soon realized that wasn't enough. These first campaign management platforms were built for a B2C world and were expensive and hard to implement, and we B2B folk were left in the cold. Until we weren't.

Enter Jon Miller (and others), who created the first SaaS marketing automation platforms for the B2B world, like Marketo and Eloqua. Amazing!

And yet ...

It still wasn't enough. Despite all its benefits, marketing automation helped reinforce a demand generation world built around automated email and the marketing qualified lead (MQL). Unfortunately, the sales teams were rightly focused on selling to accounts, not leads, and we didn't see much improvement in sales and marketing alignment.

In the marketing automation world, we suffered from two not-so-great approaches: the hand-off and the omni-channel fumble.

While we explore these approaches in the following pages, consider: **Do your teams fall into one of them?**

The hand-off

In the hand-off, marketers and sales reps stick to their siloed camps.

Marketing owns the top of the funnel, generating leads — which they pass to sales, who in turn, owns the deal close and post-sale growth. This interaction resembles a baton pass in a relay race.

But here's the problem. Marketing tends to invest heavily in top-of-funnel tactics such as inbound marketing, leaving little support for critical deals in later stages.

In fact, many sales teams ask marketing to shut off all nurturing to later-stage accounts, not trusting their impersonal campaigns to help them close important deals.

But the longer the sales cycle, the more likely it is that deals get stuck and abandoned in the sales and marketing hand-off. As they say, accidents happen at the intersections.

This causes potential deals to wither away on the vine, as they lack the attention they need to move forward.

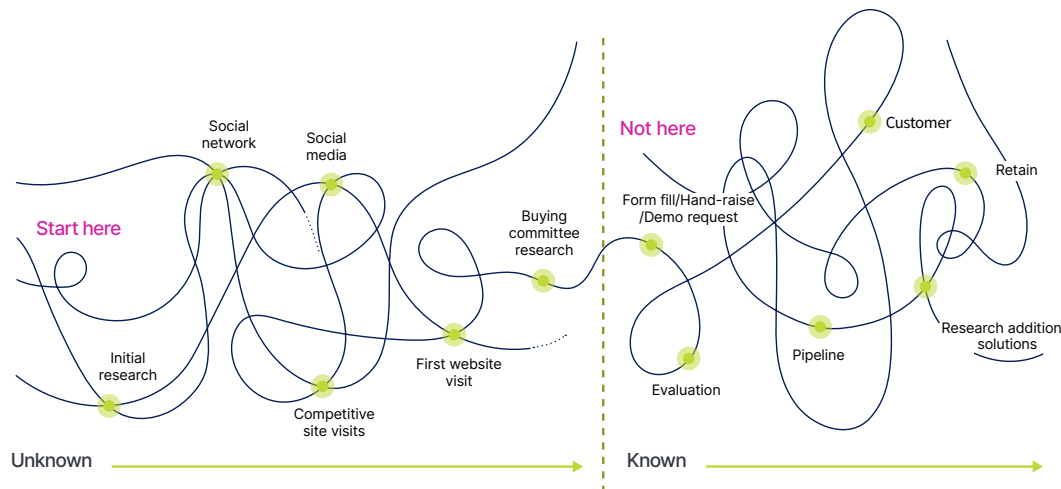


The omni-channel fumble

On the other end of the spectrum, there are no prescribed divisions between the revenue teams, causing outreach efforts to overlap.

But we get it. This doubling, sometimes tripling, up of motions across teams is totally understandable.

The B2B buyer journey is complex and non-linear. The account will often move its position in the funnel multiple times based on changes in its decision-making journey. Synchronizing efforts across this convoluted path can feel daunting, if not impossible.



“Companies with omnichannel customer engagement strategies retain on average 89 percent of their customers, compared to 33 percent for companies with weak omnichannel customer engagement.”
— Business 2 Community²

But the overlap in outreach can lead to tragic consequences, as revenue teams omni-spam contacts with redundant, disconnected messages, annoying rather than befriending the buyer.

We’re talking about a cacophony of digital invitations, offers, and meeting requests coming through a deluge of marketing emails, sales cadences, social posts, LinkedIn messages, phone calls, and so on.

Then came orchestration

For a solid ten years, this is where B2B teams have lived, in a world of one-too-many siloes and fumbles with limited automation. Doing the best we could, but still.

So the intractable innovators went at it again (yes, Jon Miller and also Chris Golec) to form the first account-based marketing (ABM) platforms to lead B2B teams into a modern world.

A revolutionary approach to selling, ABM allows teams to identify B2B buying committees at companies and surround each buyer with personalized messaging.

But we were just getting started.

Since then, we've expanded ABM to address the entire customer lifecycle, which we've coined ABX (account-based experience). ABX considers not just intent and awareness but also retention and expansion stages for a Smarter Go-To-Market™ strategy.

With an ABX lens, we focus on the needs of all customer-facing roles, including sales reps, sales enablement, post-sales, and account executives.

To that end, we've partnered with MAPs; CRM; social tools like LinkedIn and Facebook; direct mail and gifting providers like Sendoso, PFL, and Alyce; and sales engagement platforms like Outreach and Salesloft. We link these platforms to Demandbase Orchestration for audience management and workflow automations that encompass much more than traditional marketing automation.

With Demandbase Orchestration, sales and marketing teams can build dynamic journey-based audiences as well as automated actions and processes across many popular revtech and martech channels, freeing you from manual, time-consuming tasks.

With all that free time, whatever shall you do?



What is orchestration?

Orchestration is the coordination of activities, programs, and campaigns across the entire revenue team. It empowers revenue teams to design and automate high-impact account-based plays across all your channels, including advertising, sales engagement, marketing automation, direct mail, and chat.

Orchestration enables the one-on-one interaction required to build relationships with prospects and ensure success with customers. It works because it fosters authentic human engagement.

“Orchestration is the sequenced coordination of different activities, programs, and campaigns across marketing, sales development, sales, and customer success to drive engagement with multiple stakeholders in target accounts.” - TOPO³

Crafted by marketing. Approved and used by sales.

With orchestration, sales can maintain control of their high-value accounts while marketing coordinates and plans touches executed by front-line teams. And while marketers can nurture deals in a personalized, relevant, and contextual way, nothing is sent to an account without a salesperson approving it.

With orchestration, programs are:

- Account-based and operationalized at scale.
- Team-based, increasing revenue team alignment (including marketing, sales, and customer success).
- Personalized to each buyer at the most valuable accounts.
- Relevant to the key contact in the account.
- Extended throughout the entire lifecycle of the account, from acquisition to advocacy.

What is orchestration? (cont'd)

Examples of insight-driven orchestration

Orchestration can't exist without segmentation, and segmentation relies on data and insights. Here are some examples of orchestration, which use everything you know about an account to increase your chances of engaging with them.

- Changing the advertising message as an account moves through the journey.
- Launching a targeted direct mail for highvalue accounts that show intent but no engagement.
- Alerting sales reps about highly engaged accounts that they haven't already reached out to.
- Sharing validation content such as customer reviews for accounts that are in the late Opportunity stage.
- Inviting engaged executives from high-intent accounts to a VIP experience.
- Customizing the website based on the account's key investors (showing that other portfolio companies are your customers is a strong form of social proof).
- Recommending content that shows how your solution works with the specific technologies they already own.

The sweetest part about orchestrations like these:

You can automate them in Demandbase Orchestration (using the Audiences feature), freeing up your teams' workflows so they can focus on selling not time-consuming processes.

Up your game with orchestration plays

A play is a series of synchronized orchestrations (both human and automated) across departments and channels.

The “play” is the perfect metaphor for orchestration since it reflects that there are multiple people at the target account and multiple people at your company working together to interact with the account.

We like to use the football chalkboard as an analogy. As in football, multiple people on your team line up to engage multiple people on the account team, and the play is a way of orchestrating who does what and when.

Plays are a great way to effectively ensure that everyone in the company consistently follows best practices throughout their account work.

Twenty orchestrated plays for the win!

Check out the appendix for 20 examples of orchestrated plays across the buyer journey. Use Demandbase Orchestration to help you execute your plays seamlessly ... for some killer passing yards and touchdowns.

Solve your sales challenges and smash your goals

In the complex buying cycles in the B2B world, orchestration offers a clear and direct solution to nurturing deals from the top of the funnel to closed-won.

Incorporate orchestration to:

- Shorten the sales cycle length.
- Increase deal size.
- Improve deal closure rates. (Fewer deals waste away in the limbo between the opportunity and closed stages.)
- Remove people in a deal that act as blockers and stall an opportunity.
- Improve renewal rates.
- Expand within key accounts by selling more or additional products.
- Realize greater marketing ROI.

Every role benefits across revenue teams, including marketing and sales executives, field and enterprise marketers, revenue operations, sales development, and sales reps — really, any team member working on high-value account initiatives.

Three orchestration best practices

1. Apply a phased approach.

Level up your sales and marketing alignment maturity over time.

In an orchestrated sales and marketing environment, players have distinctly different positions — offense and defense — but they work together to pass the ball back and forth down the field to create and win new business and drive account growth.

Companies attempting to move marketing and sales towards the orchestrated movements of a well-practiced team can apply these three levels to reach orchestration maturity.

Level 1: Shared data

Sales and marketing share data about accounts — but act independently from each other. It's still a baton hand-off, but the departments work off the same data and metrics as a single source of truth.

Level 2: Proactive sales alerts

Marketing alerts the sales team about key insights and nudges them to take the right actions. Marketing acts as the quarterback, calling the plays that prompt the team (or at least the SDRs) to act.

Most sales reps and SDRs appreciate emails and instant messages, like Slack alerts, about account engagement. These alerts tell them where they should focus and what actions they should take without logging into the CRM.



Curious about getting really good data?

Maybe you need a data source you can finally trust, one that's robust — we're talking millions of data points — and does all the updating for you? We've got you covered. Check out [The Data Cloud Playbook](#) to learn more about the Demandbase Data Cloud.

Three orchestration best practices (cont'd)

Level 3: Orchestration via integrated plays

True orchestration is when the entire revenue team works together as a single team, perfectly in sync, running integrated plays and coordinating everything with regular standups.

Like in football, create a “playbook” of integrated plays, and then have marketing, sales, and SDRs meet regularly to “call the plays” they want to run. We call these meetings ABX Standups.

The fastest path to driving strong results from orchestrated campaigns is to start with marketing-sales development orchestration, followed by sales, customer success, and beyond.

Pro tips!

- Designate a team of marketing and account-based SDRs to partner on an exclusive set of target accounts.
- Design multi-touch, multi-channel coordinated campaigns around common themes.
- Focus your performance metrics on pipeline and qualified meetings.

Organizations that execute marketing-campaigns typically realize a 30-50 percent lift in meetings set at target accounts, with some organizations reporting a 100 percent increase! (TOPO)

Three orchestration best practices (cont'd)

2. Pick your preferred channels ... channels, channels.

There is no shortage of channels you can use in your go-to-market strategy. Use the [Demandbase Tech Stack Evaluator](#) to identify the technology-run tactics suitable for your target audiences. Here's a hit list.

What channels and tactics do you use for your account-based efforts?

Channel	% Rate as Important	% Using	% Satisfied
SDR Outbound (email, phone)	88%	87%	82%
Events	72%	67%	78%
Executive-to-Executive Outreach	70%	64%	59%
Direct Mail	67%	73%	69%
Digital Advertising	64%	79%	85%
Content Development	63%	47%	61%
SDR Social (e.g. LinkedIn)	57%	72%	61%
Marketing Email	56%	70%	83%
Site Personalization	39%	37%	63%
Content Syndication	31%	48%	73%
SDR Personalized Video	23%	28%	50%
Site Chat/Messaging	22%	17%	74%

% of respondents

Source: TOPO 2019 Account Based Benchmark Report

“Buyers resonate with different tactics, so mixing it up gives you more ways to reach the target. It’s like a stock portfolio: diversification spreads your risk and increases your chance of a response.” - Jon Miller, from *The Clear & Complete Guide to Smarter GTM™*

Pick your channels and nurture them with resource love.

It’s better to focus resources on a few channels you can execute well rather than spread them thinly across too many channels, with none getting the attention they deserve.

Curious about what channels to use? Here’s a deep dive for you: [The Clear & Complete Guide to Smarter GTM™](#). Part five of the book nicely breaks down all the top-performing B2B channels you’ll ever want and need.



Three orchestration best practices (cont'd)

3. Get your campaign foundation in order.

Before creating your orchestration plays, you want to ensure your campaign foundation is in order. This is an important step that can't be overlooked. But because this is an eBook on orchestration and not campaign building, we'll just touch on the basics.



Bonus resource!

Don't miss the worksheet *Orchestrate a Smarter Omni-Channel Campaign* at the end of this eBook. It will help you check all the boxes to build a successful campaign.

1. Set your clear campaign goals. What are your key performance indicators? What software will you use to measure performance? What's your budget? All that good stuff.
2. Identify your campaign team. Who are the stakeholders (across your revenue teams) for your campaign? Many of them will be responsible for the channels you use. Speaking of channels ...



Three orchestration best practices (cont'd)

3. Segment your audiences. Who are you targeting for your campaign? We recommend creating no more than four or five segments per campaign. Otherwise, it can get a bit chaotic.

Pro tips!

Whether you do it or someone on the revenue ops team does it for you, it's super easy to segment your audiences with Account Intelligence insights available on Demandbase Orchestrations. Plus, you can use Selectors to create precise audiences dynamically.

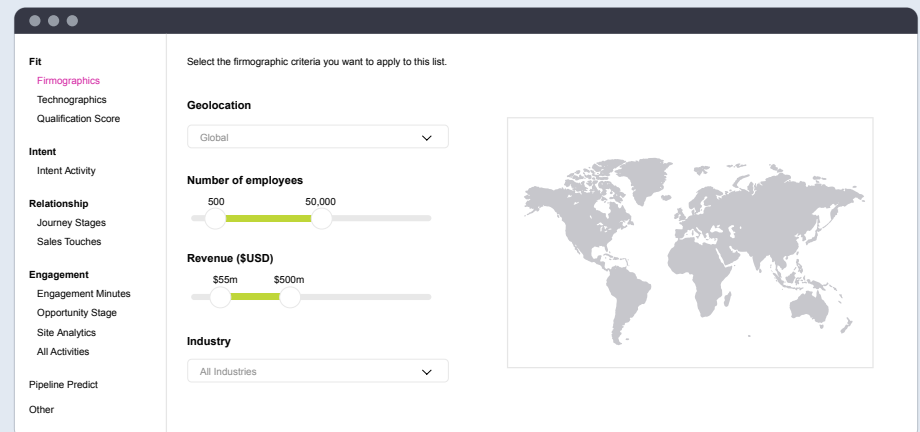
So you can spend half the time making lists and the other half celebrating how you're a genius of efficiency.

4. Group your audiences by the level of personalization. You can use account-based experience (ABX) styles to do this — grouping audiences based on one-to-one, one-to-few, and one-to-many tiers.

Finally, you've identified your channels, set your campaign goals and budget, and grouped your segmented audiences into tiers. Now it's time to assign your audiences to orchestrated plays.

Get excited! In the next chapter, we get into how you can create segmented audiences and automate orchestrations using Demandbase Orchestration.

In Demandbase One, segments are easy to create. For a basic segmentation approach, you can pick from characteristics like industry, size, region, journey stage, intent, and basic activities. As your ABX strategy matures, you can apply more complex segmentation like custom fields, relationships, and existing segments.



Do it right with Demandbase Orchestration

As we noted earlier, orchestration is not an entirely new concept in B2B. What was once basic marketing automation has evolved into more sophisticated automation across the entire customer experience for an account-based experience (ABX) strategy. For this, we have Demandbase Orchestration.

Demandbase Orchestration, a premium feature of Demandbase One, can help you design and automate high-impact coordinated activities, programs, and campaigns across the entire revenue team.

With 2x the power, it's like scrubbing bubbles for your campaigns.

With two powerful capabilities, Demandbase Orchestration serves up two times the power of your manual orchestration motions. Enter Demandbase Audiences and Demandbase Automations.



Audiences (aka The Personal Assistant)

If you engage in cross-channel outreach (if you don't, why not?), then you need Demandbase Audiences in your sales life.

Using Audiences in Orchestration, you can create dynamic audiences that sync straight to your marketing tools. (Think Google, Twitter, Facebook, Adobe, Bing, LinkedIn, Marketo, and Hubspot.)

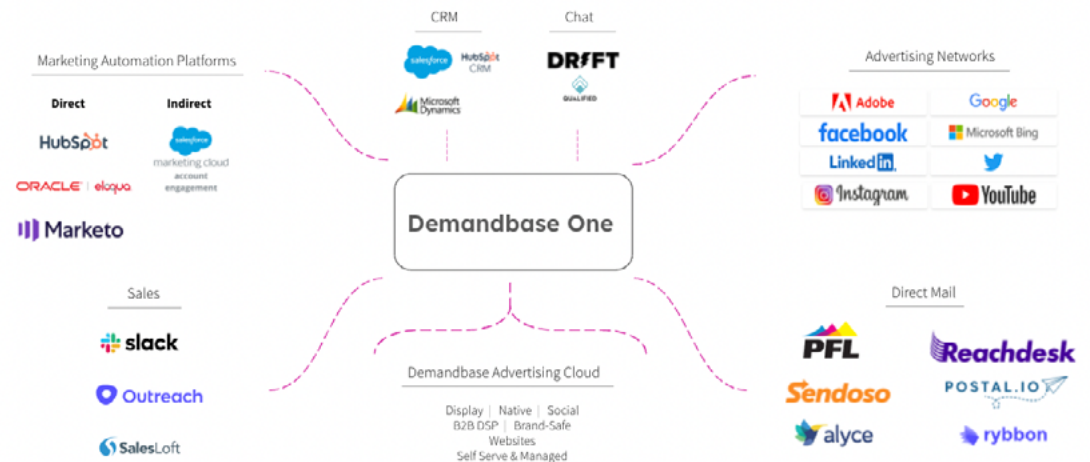
When we say dynamic, we mean it. We find the newest information on people or accounts in your audiences, and we automatically update them in destinations of your choice. And when an account moves to another stage in the journey, all the targeting and messaging gets updated across the associated channels.

You get clean data across the tech tools every day. Just in time for your morning coffee. Or with your late-night snack. Up to you.

Here's why this matters: Data in ad networks, email platforms, content management systems, and sales tools are siloed; they all use different datasets to control their audiences. That's a problem because you have disconnected, fragmented insights on each platform, potentially leading you to clunky, poorly informed outreach.

With Orchestration, you get a single source of truth, so you can align your campaign across channels with consistent messaging.

Multi-Channel Support
Take Actions directly from Demandbase to the rest of your Tech Stack



Checklist: Build your orchestration audiences

Step 1: Identify the basic audience profile.

Select the key audience. For prospects, identify the stage of the account journey you are targeting. And if you are focused on upselling and cross-selling to customers, identify the products and services they already use (so you can exclude them from your list).

- Prospects
 - Stage of buyer journey (awareness, interest, or consideration) _____
- Customers
 - Current products and services _____
- Partners

Step 2: Use Account Intelligence insights to refine your audiences.

- Consider sophisticated segmentation with more detailed information. For example, you can apply roles, location, intent, and so much more.

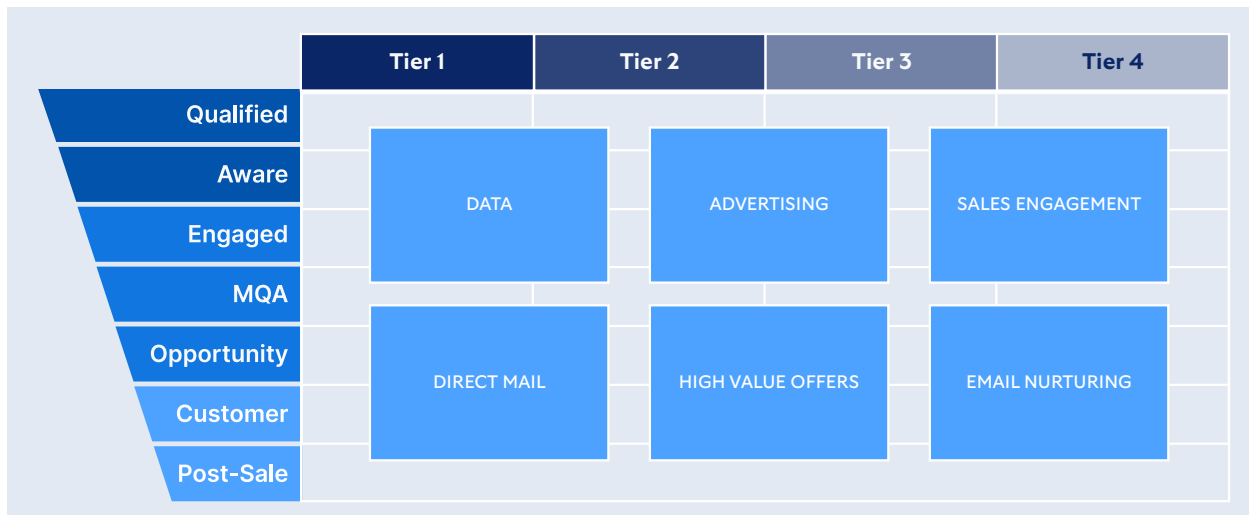
(Remember, Demandbase uses 14 different data types for deep Account Intelligence insights.)

With the information from steps 1 and 2, you are ready to link your audiences to Demandbase Destinations.

Step 3: Prioritize your audiences and apply orchestration plays based on their priority level.

- Once you've created the audiences you want to go after, place them in ABX tiers (Tier 1: one-to-one, Tier 2: one-to-few, Tier 3: one-to-many, Tier 4: no personalization).
- Consider the spend and resources you want to allocate to each tier.
- Match the tiers to your orchestration plays based on their stage in the buyer journey and priority. For example, Tier 1 accounts will get the most sophisticated level of orchestration.

With the additional account prioritization from step 3, you can match up orchestrated plays incorporating Demandbase Automations.



Identify the journey stage(s) you are focusing on. Then, match the types of outreach to the tiers of ABX. Your Tier 1 accounts will receive the most personalization and resources as those are your highest priority accounts.

You've already got it. So flaunt it!

If you use the ABX Cloud's Engagement Platform, you automatically get access to creating three audiences in the Demandbase Orchestration solution. Oh, yeah!


This is a fantastic place to start, as you can dip your toes before investing in the full Orchestration solution.

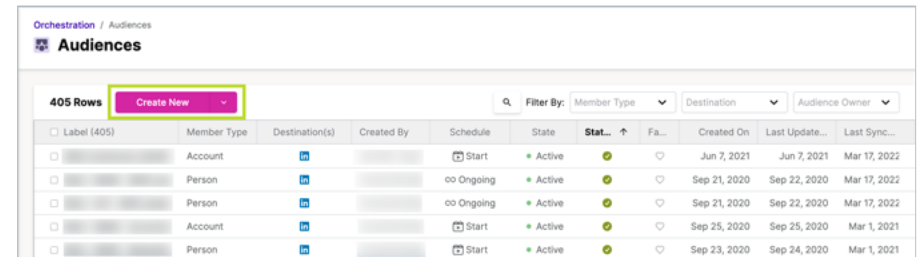
How to create an audience through Audiences in Orchestration

First, you'll want to leverage the Audiences feature within the Orchestration section of the Demandbase Engagement Platform.

Then, once you are inside the Audiences feature, you can use the Selectors tool to access all of that rich Account Intelligence and define segments of people or accounts and send them directly to the third-party destinations of your choice.

This allows your target accounts to have a consistent experience across your martech tools.

1. From the left navigation bar, go to  Orchestration > Audiences.
2. Click Create New.



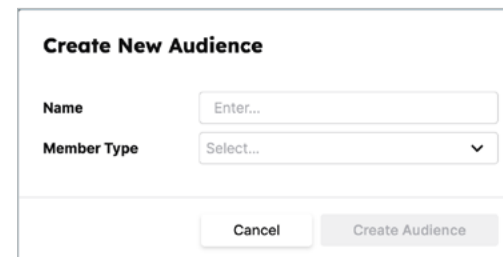
Orchestration / Audiences

Audiences

405 Rows Create New Filter By: Member Type Destination Audience Owner

<input type="checkbox"/>	Label (405)	Member Type	Destination(s)	Created By	Schedule	State	Stat...	Fa...	Created On	Last Update...	Last Sync...
<input type="checkbox"/>		Account			Start	Active			Jun 7, 2021	Jun 7, 2021	Mar 17, 2022
<input type="checkbox"/>		Person			Ongoing	Active			Sep 21, 2020	Sep 22, 2020	Mar 17, 2022
<input type="checkbox"/>		Person			Ongoing	Active			Sep 21, 2020	Sep 22, 2020	Mar 17, 2022
<input type="checkbox"/>		Account			Start	Active			Sep 25, 2020	Sep 25, 2020	Mar 1, 2021
<input type="checkbox"/>		Person			Start	Active			Sep 23, 2020	Sep 24, 2020	Mar 1, 2021

3. In the Create New Audience window, enter the following:
 - . Enter a Name for the Audience.
 - . Select Person or Account from the Member Type drop-down list. The third-party platforms you can select for Destinations differ based on your chosen option. Select Person to sync people to the third-party platform. Select Account to sync accounts to the third-party platform.
4. Click Create Audience.




Create New Audience

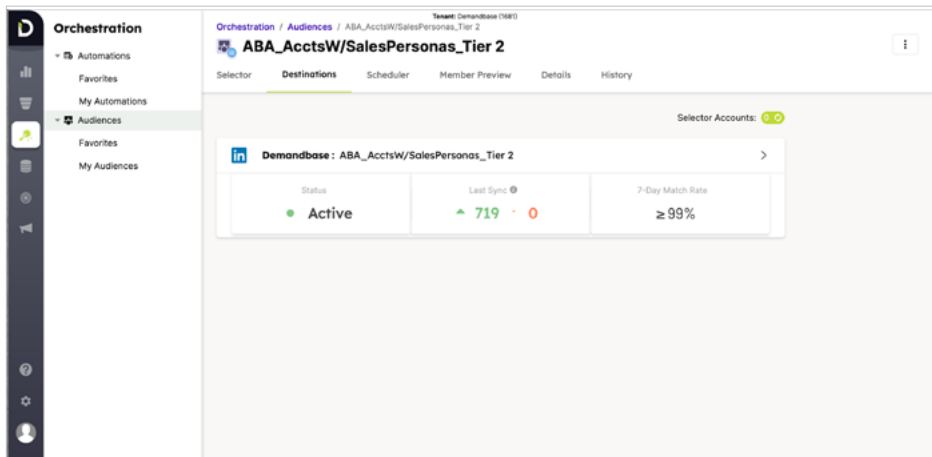
Name

Member Type

You've already got it. So flaunt it! (cont'd)

How to view and manage an audience

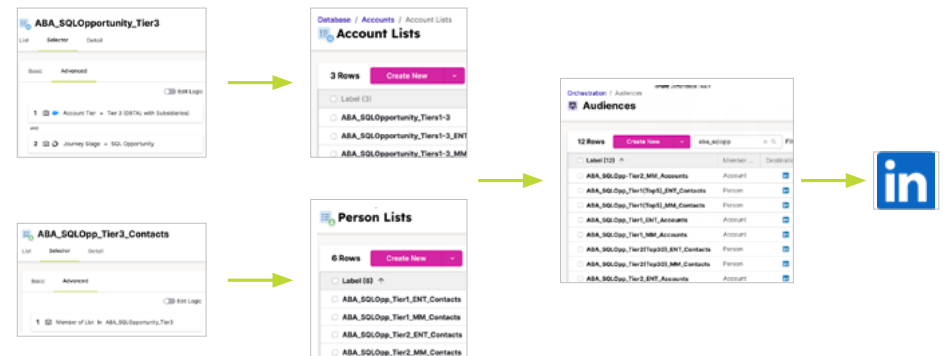
- Once you've created your audiences, you can select which ones you want to add to a destination.
- From the left navigation bar of the Engagement Platform, go to  Orchestration > Audiences and click the name of the audience you want to view. Audiences include six tabs, as highlighted in the screenshot below.



- Selector:** Like most areas of Demandbase that use selectors, the Selector tab is where you go to select the people or accounts you want to add to a destination.
- Destinations:** This is the third-party destination of the people or accounts who qualify in the Selector.
- Scheduler:** Specify when you want your audience to start and stop syncing to its destination.

- Member Preview:** This shows you all of the people or accounts who qualify for your audience based on the Selector you have set up.
- Details:** Here, you get details about the audience, like who created it, when it was last modified, the description, etc.
- History:** This tab provides you with the details of what has happened with each sync of the audience to its destination. It's where you can see the job and action statuses that have been completed as part of the audience sync.

As depicted below, once you build your audiences, you can choose which marketing tool destinations you want to sync them to.



A single source of truth

With the Demandbase Engagement Platform, all your intelligence and account insights are connected as a single source of truth. You unravel the tangle of cross-system data and get the full picture of every account. All in one place.

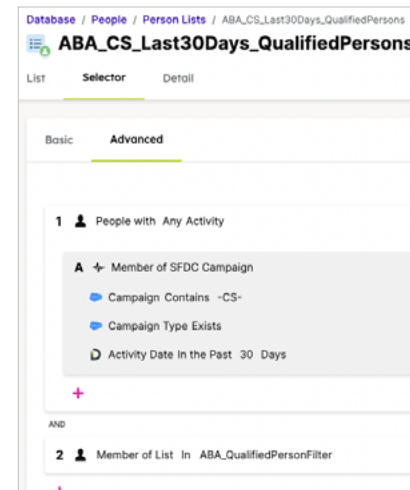
So all those audiences you build are accessible across all the products and features in Demandbase One. With this one single source of truth, you get:

- Consistency in messaging
- Consistency in content across channels
- Scalability
- Agility when needed
- Ease of reporting

When creating a new audience, you can choose to use the Member of List selector.

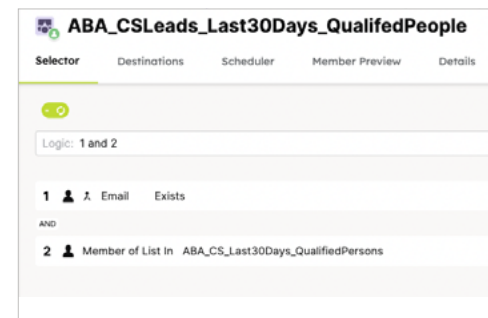
When you choose the Member of List selector, you access the foundational account or people lists you created in the Engagement Platform. So if you ever need to make changes to your list, you can do so in the foundational list, and those changes will automatically apply to your Audiences (and you don't have to make the change in your individual Audiences). The other nice thing: This practice helps you maintain one source of truth, which you can report on objectively from your site analytics.

To create an audience from an existing list, go into Selector, click on Advanced, and select the list. In this case, you can see that the list that was chosen includes qualified contacts that have had activity in the past 30 days.



In this example, we have selected a Person List from the Database that consists of contacts in the Customer Success (CS) persona that have shown engagement within the past 30 days.

Then, we made that Person List the foundational list for the Audience we built in Orchestration.



Sample audiences for your plays

How you segment your audiences is only limited by your imagination. Here are two audiences that are go-to's by the Demandbase digital marketing team. These audiences can be used for marketing-actionable campaigns, sales-actionable motions, or both!

May they serve as inspiration.

1. Acquiring new contacts for target accounts in the sales qualified or discovery stage of the pipeline

Make sure to sync both account lists and contact lists to LinkedIn. That way, you can suppress the current contacts in the account and focus your campaign dollars exclusively on the net new contacts (and you're not wasting campaign dollars on contacts you already have). No wasted spend!

- ➔ Sales-actionable: Add this audience to sales outreach automations — like network expansions on LinkedIn — freeing up sales development reps from having to do it manually.
- ➔ Marketing-actionable: Marketing can run an ad campaign on LinkedIn to engage new contacts.

Target these accounts, but not these people in those accounts

Who is your target audience?

Include people who have **ANY** of the following attributes:

- Third Party Company**
ABA_EMEA_SQL_Accounts

Narrow audience further

Exclude people who have **ANY** of the following attributes:

- Third Party Contact**
EMEA-SQLOpp-Contacts

2. Reaching target accounts that are engaged.

When you create this audience, you'll identify the accounts from your CRM campaign with contacts engaging in content during a determined time. You can also layer in intent to leverage the correlation between the downloaded content and intent to improve outreach.

- ➔ Sales-actionable: Sales development reps can leverage this list for an outreach campaign.
- ➔ Marketing-actionable: Marketing can run a campaign to nurture accounts into sales-qualified status.

1 Accounts with At least 3 Activities

- A Member of SFDC Campaign
 - ∩ Campaign Contains Integrate, Demandworks
 - ∩ Campaign Type Exists
 - ∩ Activity Date In the Past 1 Month

+

AND

- 2 SDR Owner Exists

In this example, we identified accounts from a campaign with at least three contacts that have engaged with syndicated content in the past 30 days.

Automations (aka The Workhorse)

Because customers' expectations are informed by their B2C experiences, B2B companies must keep up.

How do you provide a seemingly endless stream of personalized content and personalized brand experiences without a marketing team the size of a small army?

How do you make sure the brand experiences of your prospects and customers' experiences stay consistent across marketing, sales, and customer expansion team interactions?

How do you keep all the data clean while the way you sell and retain customers becomes more complex?

In other words, how do you scale your workflows?

The answer lies with Demandbase Automations. Think of it as “if this, then that” workflows for your go-to-market.

An Automations accolade

Demandbase was named a top global marketing automation vendor for 2022 on [Research In Action's Vendor Selection Matrix™](#) for Marketing Automation. We were given the highest possible rating for our price/value ratio, and we were awarded particularly high marks for our innovation and differentiation, not to mention an outstanding recommendation index of 98 percent. Just saying.

Automations (aka The Workhorse)

With Demandbase Automations, set up dynamic orchestration motions to your heart's content. Then sit back and bask in your brilliance.

It's pretty simple to do. You just go into the Automations section of Orchestrations and select your criteria through the Selectors tab.

Here are just a few examples of the automations that members across the sales and marketing team you can pull off:

Revtech automations

You can automate the addition of any audience to your revtech tools, like Outreach and Salesloft.

Advertising automations

Automations can manage ad audiences so that the moment an interaction with a target account is recorded in your CRM, the account will be removed from or added to a digital ad.

(Example: If someone has agreed to a meeting, an automation will identify the activity in your CRM and will remove the contact from the ad audience for "Take a Meeting!" ads.)

Campaign automations

Add specific personas who have been visiting your site to a nurture campaign in Marketo, HubSpot, or Pardot to keep executives engaged.

(Example: When a prospect moves from one stage of the buying journey to another (such as from "aware" to "working"), Automations can record this change and add a date stamp so that you can track the average lifespan of buying stages at your organization or pull up a timeline of a specific deal.)

SDR automations

An automation can be set to create a task for an SDR whenever a prospect meets specified engagement criteria. The SDR can then send an event invite or a direct mail package.

(Example: A CMO has completed a survey or course. The automation will ping the SDR, letting them know what sort of package they should send and prompting them to create a personalized message for the package.)

Automations (aka The Workhorse) cont'd

Data cleansing automations

Set automations to clean up fields with multiple different inputs.

(Example: Automations could change all fields with The United States of America, US, America, and United States to USA with the click of a button. That way, USA is used consistently across your systems.)

Assignment automations

Automations can take care of territory and account management for the sales team.

(Example: When an account is created, Automations will automatically assign responsibility for that account to the correct SDR and AE based on where the account is located geographically.)


Of course, if you don't have Demandbase Automations, these types of workflows are still within your reach. Automations are simply tools you can incorporate as you continue to level up your go-to-market strategy.

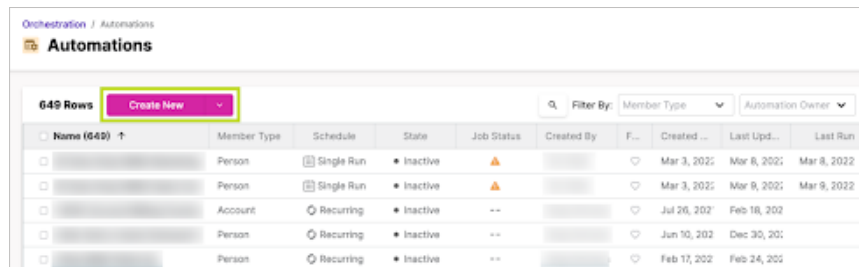
It will take more time and calendar reminders, but it can definitely be done manually. And it's well worth the effort when the payoff comes in the form of closed deals and happy customers.



How to create an automation

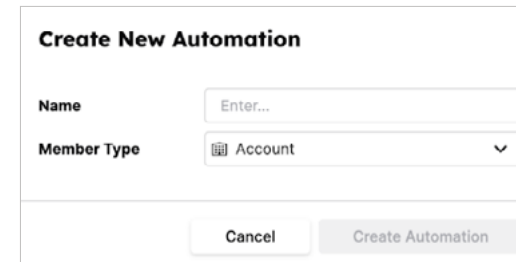
Demandbase finds people or accounts in your database based on the Selector logic. Then at the scheduled date and time, it runs the members through all of the actions you have specified.

1. From the left navigation bar, go to  Orchestration > Automations.
2. Click Create New.



In the **Create New Automation window**, enter the following:

- Enter a Name for the Automation.
- Select Person or Account from the Member Type drop-down list. The actions you can add to an Automation depend on your selected option. Select Person to run your Automation against people. Select Account to run your Automation against accounts.



The screenshot shows the 'Create New Automation' form. It has two main fields: 'Name' with a text input field containing 'Enter...' and 'Member Type' with a dropdown menu set to 'Account'. At the bottom of the form are two buttons: 'Cancel' and 'Create Automation'.

3. Click Create Automation.

FINAL THOUGHTS

A special shout-out to Demandbase customers (because there's nothing wrong with a little ROI brag)

Hi there! Did you know that with Orchestration as part of your go-to-market strategy, you're already an ROI wiz? You go, Smarty Pants.

Most SaaS platforms out there don't offer an easy way to identify and leverage deeper AI and machine learning insights. Well, that's too bad, isn't it.

Only Demandbase One allows revenue teams to orchestrate a true account-based experience (ABX) strategy, leveraging Account Intelligence for deep journey-stage insights and personalized, relevant outreach.

Because with Demandbase Orchestration you use the same dynamic Audiences (data) across your marketing channels, you can analyze performance on an apples-to-apples basis. You can compare engagement across journey stages and other KPIs and use that insight to determine where and how you spend your marketing dollars across those channels.

B2B organizations that aren't measuring and analyzing the customer journey on a stage-by-stage basis are missing out. They're missing out on the opportunity to track their strategy's ultimate contribution to revenue growth and operating profits. They're missing out on illuminating opportunities to increase the conversion rate at each stage and improve the return of their go-to-market investment.

Lucky you. You chose wisely.

There's no better way to show ROI than with Demandbase Orchestration in your toolkit. So go ahead and be pleased. You did well in choosing Demandbase, the Smarter GTM™.

20 orchestrated plays

Like anything else in B2B sales and marketing, there are various types and levels of complexity for plays. The more tactics in your plan — and the more martech in your stack — the more you need orchestration.

When thinking about your plays, look at it from the deductive framework of if-then statements. Here are a few of our favorite orchestrations that you can build upon to create more sophisticated plays.

If this then that
ICP accounts that are not yet engaging with your website and campaigns	Advertise to build awareness and attract them to your website
Target account that's aware but not in-market	Send a personalized or fun gift to build brand affinity
Key executive from a top target downloads content or registers for a webinar	Offer a meeting with your subject matter expert or prompt the AE to reach out for a personalized demo
Qualified accounts that are a good fit for personal invites to an upcoming roadshow	Orchestrate direct mail and human outreach
New marketing qualified account (qualified and in-market)	Reach out to multiple personas at the account
Valuable accounts that aren't responding over other channels	Use hyper-personalized, high value offers to engage with top decision makers
Lower-level contact from key account attends an online demo	Lift the conversation by inviting a C-level exec to meet with one of your top executives
Open opportunity	Help the full buying committee drive validation and consensus with broader advertising and executive alignment
Stuck or lost opportunities that show intent or engagement from key personas, but don't have any recent sales touch	Alert the account executive to take action and/or bring in new voices and channels to get the conversation going again
Existing customers that start showing intent or engagement in products they don't yet own	Reach out to the new buying center using your team and your existing contacts at the customer
Customer showing intent for competitor keywords	Alert the CSM and account manager, set up executive alignment meeting

20 orchestrated plays

In the following examples, we group orchestration plays by the point in the buying cycle they'd be used. Also, keep in mind that multiple plays can be used in any one stage of the buying cycle, depending on how the deal progresses. You can also link plays together for increasing sophistication.

Whether you're looking to punch a few yards to get to the next down and keep the momentum going or are ready to make the touchdown, these converting plays will help you score a win.

Quick Tips:

1. Steps that can be accomplished with Automations are highlighted in lime. But know that you can just as effectively run these plays by replacing the automated action with a human one. They'll just take more time and resources to execute.
2. As you go through these plays, you'll notice the encompassing motions that entail sales outreach. In this part of the play, you can leverage a wide array of channels, from sales enablement revtech software to emails and social channels. Consider what makes the most sense for the contact and account you are reaching out to. And, of course, with Demandbase Orchestration, you can make sure that your audiences on those channels are complete with the most up-to-date information, so that outreach is timely and well played.

Intent and engagement plays

Use these plays when a potential buyer isn't known to your sales team yet, but they're in the research and discovery phase.

Use intent data from Demandbase Account Intelligence to optimize these plays across your martech stack. These plays are also applicable with first-party engagement data: You can use them when a prospect fills out a form, attends an event, or otherwise makes themselves known to you.



Intent and engagement plays

1. The Interception

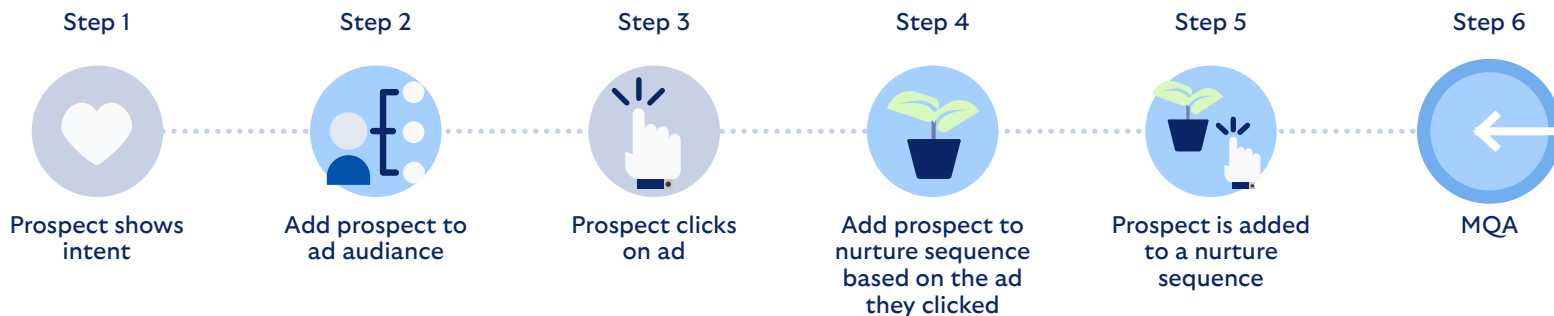
(Build the brand early in the account journey)

This play is for people actively searching for your solution that you don't know about. You use advertising to build awareness and attract them to your website.

By leveraging intent data and combining it with a multi-channel orchestrated play, you can drive engagement and influence how and when they buy.

Send personalized site experiences.

Identify qualified accounts that are not yet engaging with you and use advertising to build awareness and attract them to your website. Then, customize the website to personalize the experience — custom content hubs for 1:One accounts, or customized by industry and/or journey stage for others.



Intent and engagement plays

2. The Long Pass

(Nurturing engagement)

This is a play focused on sales development rep (SDR) motions that nurture high-value accounts. It's based on a play from TOPO and incorporates multiple channels, including voicemail, email, video, one-to-one outreach and more.

Here are the actions that an SDR can take, step by step:

Send a personalized email of introduction.
 When a new rep enters a territory for the first time, they can send an email identifying themselves as the new point of contact and offering to schedule an introductory call.

Step 1	Step 3	Step 5	Step 6	Step 8	Step 11	Step 11
Intro email + voicemail	Follow up on email with high-level value proposition (broad scope to ensure applicability)	1:1 personalized video (channel of your choice)	Email follow up on voicemail	Email calling out specific product fit	Call or voicemail	Email follow up on voicemail, call out why you offer value to their role
Step 14	Step 16	Step 20	Step 24	Step 27	Step 31	Step 31
LinkedIn connection request	Voicemail	Short video demo of solution most applicable to their role/priorities	LinkedIn message	Email citing relevant partnerships/solutions	Voicemail	Email follow up on voicemail citing Twitter bio or other social media tidbits
Step 35	Step 35	Step 38	Step 40			
Voicemail	Email follow up on voicemail with current product updates	LinkedIn follow-up note. Call + voicemail	Call + voicemail. Move prospect to nurture			

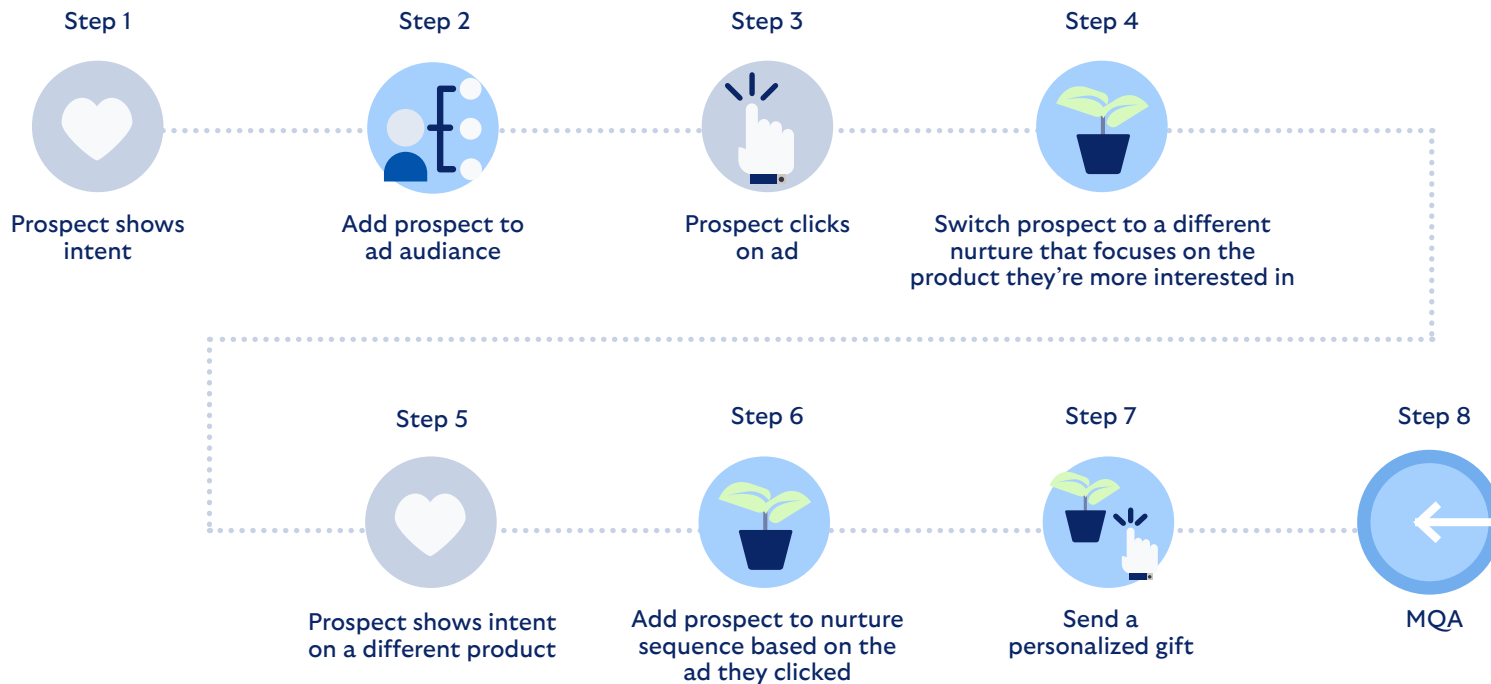
Intent and engagement plays

3. The Belly Run

(Retargeting to reach MQA)

This play is for high-value prospects that are aware of your solution but haven't shown the level of engagement sufficient to merit your sales development team to start reaching out.

Send gifts to engage new accounts in a fun, friendly way. Accounts may appreciate a personalized or fun gift (cupcakes, ice cream, something related to pop culture) — and perhaps you can throw in a valuable piece of thought leadership content as well.



Intent and engagement plays

4. The Grab

(Getting opt-in permission)

In Smarter GTM™, you often build out your database with contacts for target personas. But those key people may not have given you permission to send marketing emails. So you can't send them nurture emails and newsletters to nurture their engagement in a scalable way. Use this play to get opt-in permission.



Intent and engagement plays

5. The Reach

(Getting into the account)

This play is for a list of target accounts where you don't know the people in every single account.

For the accounts that don't have contacts attached to them, you can target everyone in the company with ads and then wait until someone self-identifies. Suddenly, you've got an inroad to an account you didn't before.

Active SDR outreach so leads don't wither on the vine. Monitor when open opportunities are showing intent or engagement from key personas, but don't have any recent sales touch, and alert the account executive to take action.



Intent and engagement plays

6. The nurture

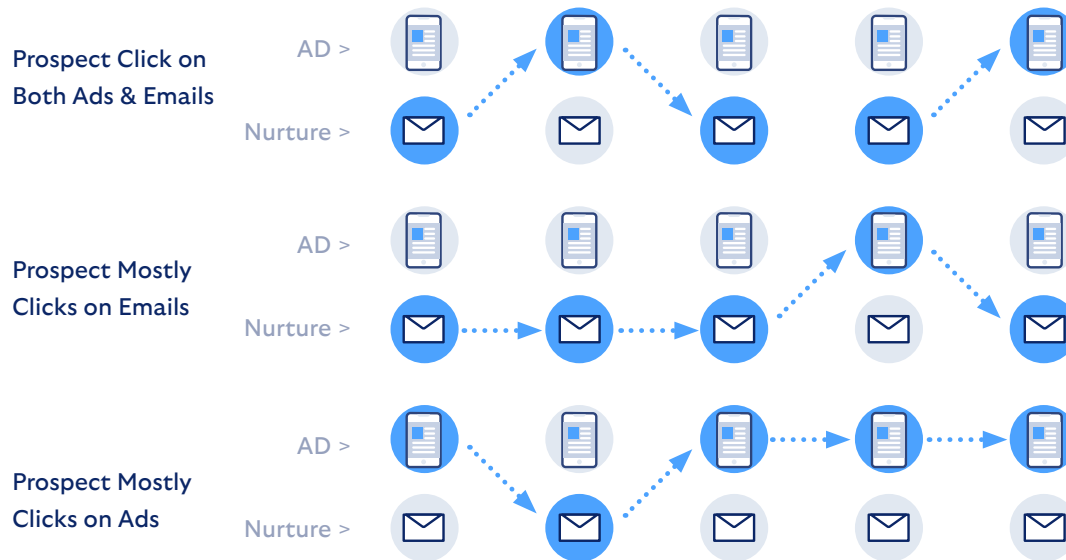
(Taking it an extra step with if-then scenarios)

With orchestrations, you can make sure your contact experiences the same flow of information, regardless of what platform they're on.

For example, if you have five emails in your nurture stream (A, B, C, D, and E), you can also put that content on an ad.

Example A: Say your contact clicks on your first nurture email, which contains content A, and they don't interact with anything else. Then next week, you can send them a nurture email with content B, and so on for five weeks.

Example B: Your prospect opens your first nurture email (with content A). Then, they click on an ad that shows them content B. Because they already consumed content B, the next email they receive in their nurture stream will contain content C. If they consume content C, the next ad they'll be shown will contain content D. But if they don't click on the ad with content D, then the next email they receive will also be about content D, to make sure that they consume it.



Marketing qualified plays

These are plays to run once a prospect has reached marketing qualified lead (MQL) or marketing qualified account (MQA) status and you're trying to get them to take a meeting.

The main thing to keep in mind with prospects who have reached this stage is that they should no longer be receiving ads or other content from marketing, since those are designed for a different stage of the funnel. That means you must update your ad audiences every time an account hits MQA status (or use Audiences in Demandbase Orchestration to automatically remove them).



Marketing qualified plays

7. The Scrub

(Creating consistency)

This play focuses on getting the audiences and data right when a prospect becomes marketing qualified.

Following all the steps in this play will maximize your ad ROI because you won't be targeting people who are already speaking to sales reps. Plus, it will keep your data clean by making sure you always update your CRM, and it will keep the prospect's experience consistent as they shift from marketing to sales interactions.



Marketing qualified plays

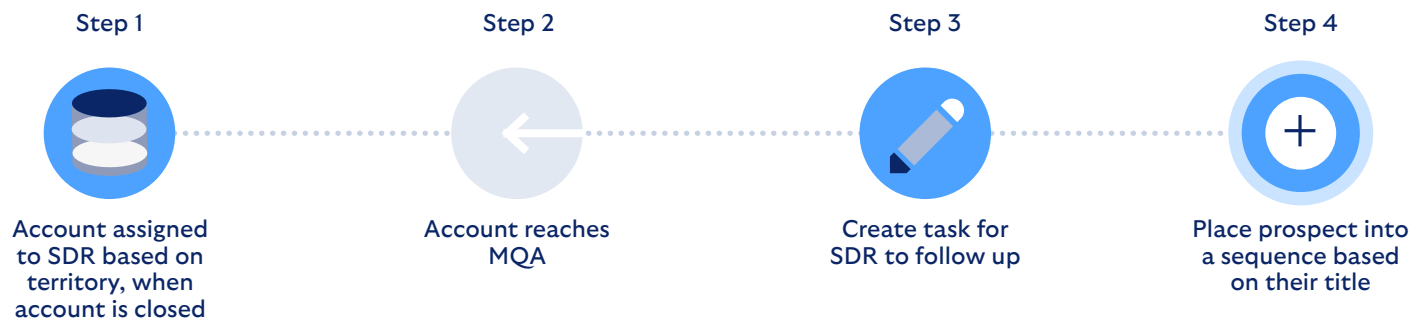
8. The Toss

(Handing the account to the SDR)

Concerned that your SDRs aren't following up on the leads that marketing creates? It's a valid worry: after all, you spent so much time and energy engaging with those accounts! But if they're lost in the hand-off to Sales, you might as well have done nothing. That's where assigning tasks based on MQA comes in.

It's a good idea to have a few different sequences that are customized based on title, so that a CMO isn't getting the same information as a marketing ops person.

Use hyper-personalization to connect with valuable accounts that aren't responding over other channels. If a valuable MQA goes quiet and isn't responding to SDR outreach, try something different: a message from another person at your company, a personalized celebrity message using Cameo, or a high-end gift to the top decision maker.



Marketing qualified plays

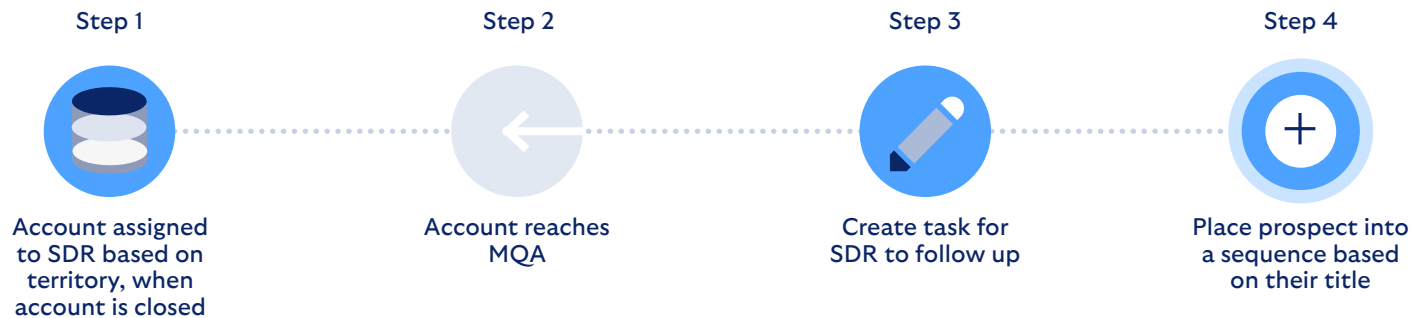
9. The Wedge

(Nurturing with direct mail)

With this play, you're sending a gift before the contact takes a meeting.

There's a million different direct mail strategies out there. With this one, you send a direct mail package once a prospect is MQA, but before they've taken a meeting. It's a show of goodwill to the prospect, as you're willing to give them value before they give you value.

Increase sales meeting attendance with gifts.
We've all experienced the challenge of our key prospects forgetting or simply not showing up for sales meetings. Sending a gift like a coffee or meal card one hour before the meeting can increase the chances they'll show up.



Marketing qualified plays

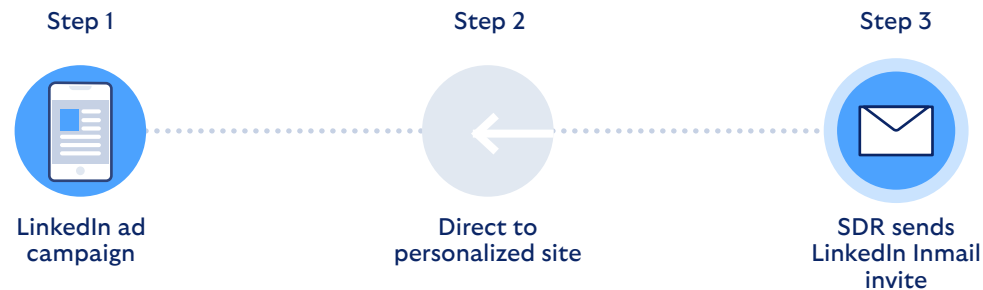
10. The No Wasted Spend

(Acquiring new contacts)

Do you need more contacts in high-priority accounts? With this play, you focus on acquiring new contacts in accounts that are in the sales-qualified stage.

For the audience in your LinkedIn ad campaign, you would include all of your accounts but would suppress the known contacts that are already on a separate audience list.

Up-level your conversations by connecting to the decision makers. The people who fill out an online form or come to your tradeshow booth are often influencers, recommenders and researchers, not true decision makers. Instead of treating them as hot leads to jump on, use these as signals of account-level interest. For example, if a lower-level contact from a key account attends an online demo, try also inviting a C-level exec to meet with one of your top executives.



The Hail Marys

These are for when you've had a prospect talk to sales, but then they've gone dark for some reason.

Letting go of these prospects means letting go of potential deals, but a lot of companies let them slip through the cracks because of the effort it takes to re-engage. Not anymore!



The Hail Marys

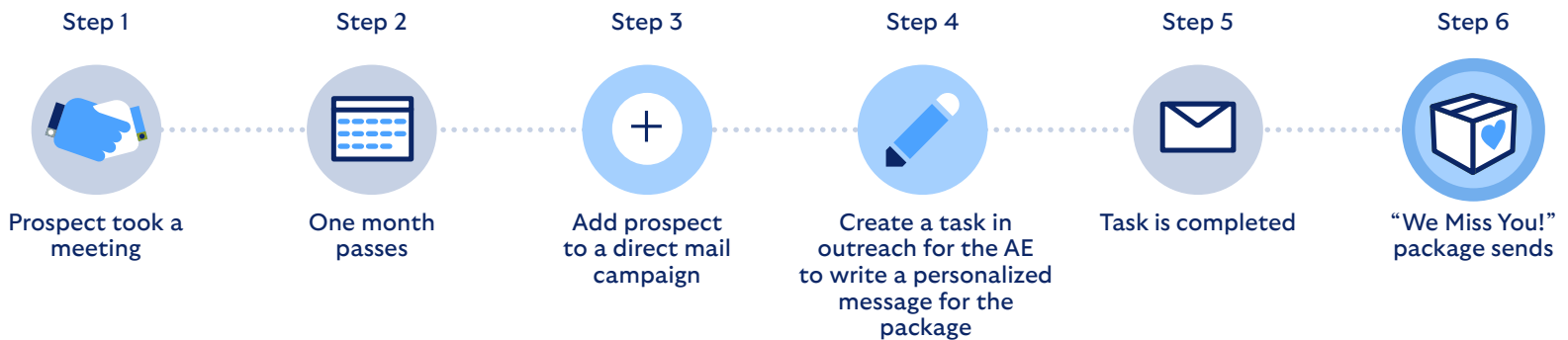
11. Hail Mary: Cuz you got ghosted

The prospect took a meeting, but then they went dark.

If they're not responding to traditional outreach, then direct mail is a great tool to get their attention.

If a prospect ghosts you ... then it's time for a bit of stalking. (But not real stalking. Only classy business stalking, please.) (For example, send a "Why'd You Ghost Us?" package for this scenario, where you send prospects a cute little stuffed ghost. Doing something like that is a fun way to get the conversation going again.)

When an opportunity goes dark, change things up.
 If the buyer stops responding to the account executive, try bringing in new voices and channels to get the conversation going again.



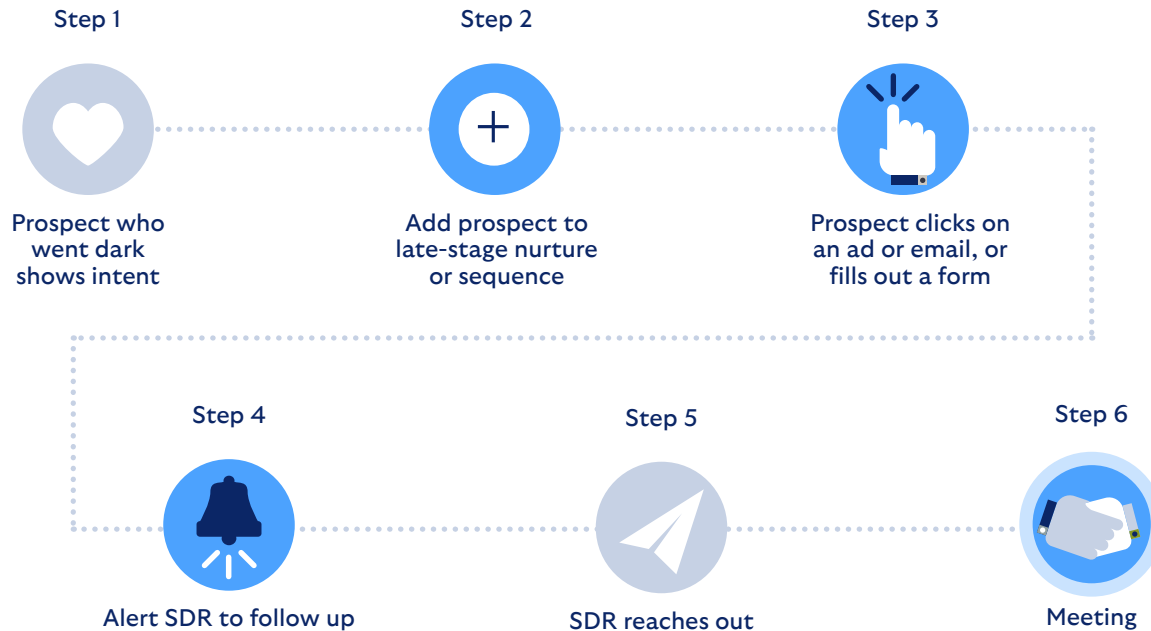
The Hail Marys

12. Hail Mary: The “Guess who I ran into?”

Then the prospect comes around again, you make your move!

When you see an account with lost opportunities is showing intent, either by surging on intent data or interacting with your brand in some other way, it may be a great time to pick up the conversation again and alert the SDR to follow up.

This play can work either before or after a prospect reaches MQA status.



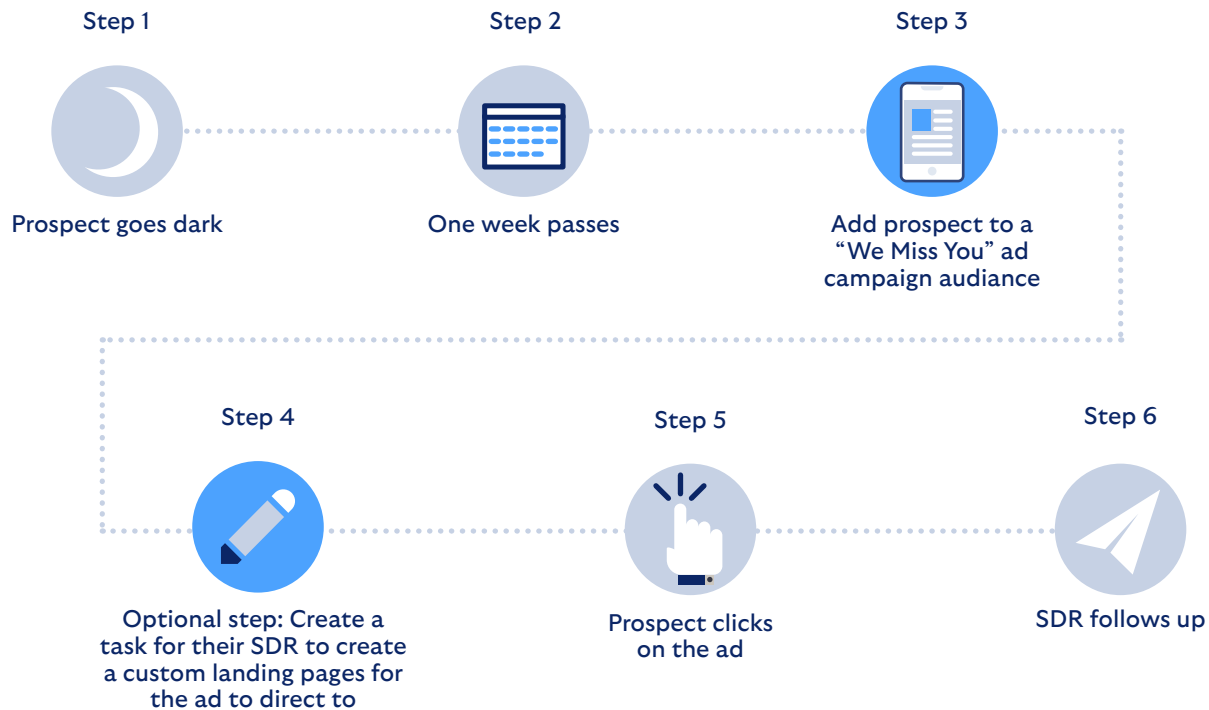
The Hail Marys

13. Hail Mary: The ad campaign flex

The account walks away, but you need to capture their attention.

You know those emails you get from stores that tell you when you've left something in your cart? "Yes, Brenda, I know you don't need that \$200 sweater, but it's still here waiting for you. And it would look so good on you ..."

This is the ad equivalent of that email. If you have ads already designed for a Hail Mary scenario, then it's easy enough to add people to the audience for them.



Closed won plays

Congratulations! You closed the deal!
Take a minute to celebrate.

But once you're done, it's back to work.

Customers often require just as much effort from marketing in a SaaS environment, since you have renewals, cross-sell, upsell, and customer advocacy to consider. Whew, that's a lot!

Thankfully, we've got plays for all of it.



Closed won plays

14. The Screen (Ads for upsells)

The play for customers that could use a little extra ad love.

If you only sell one product or if your customer has already bought all your products, then it's best to put your customers on an ad suppression list. After all, if they don't have anything left to buy from you, then it's annoying for them and an unnecessary drain on your ad budget.

But if you do sell more than one product or are hoping to expand adoption of your product within your customer's organization, then some well-placed ads are a good idea. If that's the position you're in, then this play is for you.

Expanding into existing accounts is a key component of Smarter GTM™. Monitor for intent and engagement by product line and identify existing customers that start showing interest in products they don't yet own. Leverage your team to reach out, but also work with key advocates from the customer account as well.



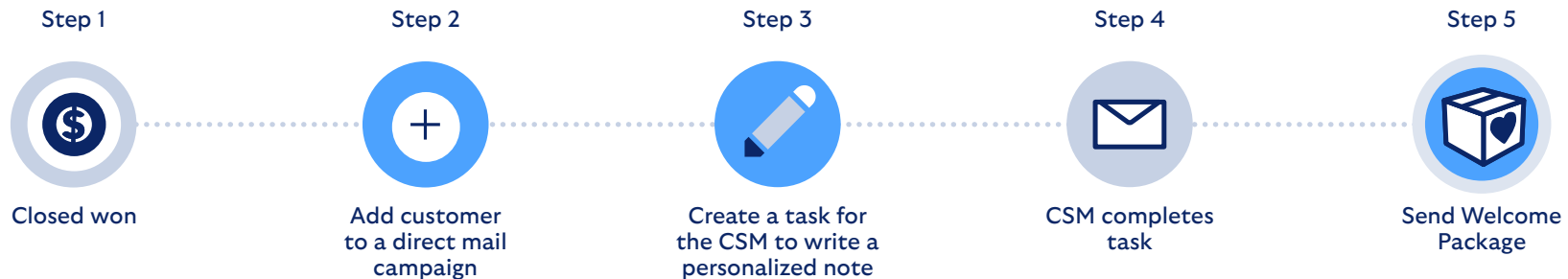
Closed won plays

15. The Extra Point (Gifts that keep on giving)

The play for new customers. Cuz, heck, you just care.

Welcome packages are a great way to build customer loyalty and jumpstart your customer's learning process as they adopt your product. Sending over a box with some celebratory swag, some learning materials, and a letter introducing them to their CSM and other relevant people at your organization is a good way to let your customers know you care about them.

Let's face it — even the best companies sometimes end up with unhappy customers. When you come across a detractor, launch an NPS play from an executive to get feedback, give your customer a voice, and maybe even turn them into a promoter. And then, once they're happy again, follow-up with a gift to seal the deal.



Closed won plays

16. The Bootleg (To grow the love)

If you have a customer advocacy program, then this play is for you.

Customer advocacy is one of the single biggest ways that companies can build their brand reputation and increase their revenue, because a happy customer is a customer who stays. And poor retention is the enemy of any business!



Closed won plays

17. The Spike (For more renewals)

If you have a customer advocacy program, then this play is for you.

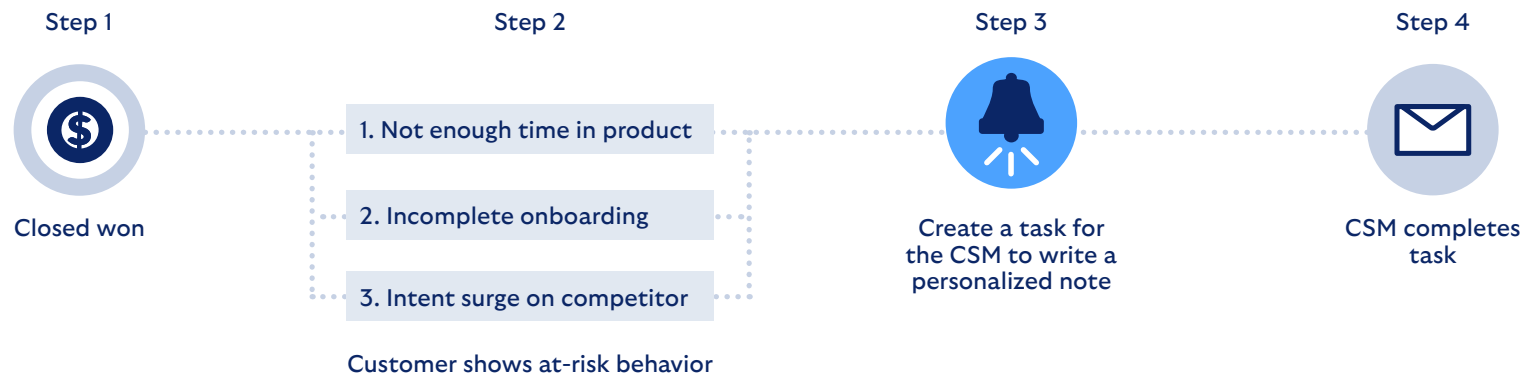
While it can be tricky to tell if a customer is at-risk for renewing, some examples are: not finishing onboarding, not spending enough time in the product, your product’s champion leaving the organization, or surging on intent for one of your competitors.

If you’re using Automations, all of these things can be tracked digitally.

If you’re not, then your customer-facing teams can watch out for them. If any of these things happen, it’s best to get on it as soon as possible. After all, you worked so hard to make that deal happen!

You can’t lose it now!

When a customer responds to your NPS survey with a 9 or 10, the timing is ideal to reach out to bring them into your formal advocacy program (referrals, case studies, reviews, etc.). There’s nothing more effective to achieve that than with personal outreach from your team.



Closed lost plays

You can't win them all.

Or can you?

Closed lost plays are perfect for when you've lost a deal, but you aren't ready to give up quite yet. Whether you want to learn what you did wrong to make sure that you don't repeat the same mistakes in the future, or you want to poach them from your competition (or maybe a little bit of both), the plays in this section have you covered.



Closed lost plays

18. The Safety (Closed lost analysis)

If a deal falls through, and you need to know about it.

Maybe this sounds familiar to you: A big deal is about to go through. It's the talk of the company. You're already dreaming about what it will do to your stock options. And then... it falls through.

But this is no time to mope! This is the time for marketing to put on its Sherlock Holmes hat (Surely you keep one of those in your desk?) and figure out what went wrong.

If you use Automations, then it can be set to ping you whenever a deal at a certain threshold falls through. If you don't use Automations, then talk to your sales ops person ... or interrogate the AEs whenever they look sad.



Closed lost plays

19. The Blast (Closed lost ad audience)

If a deal falls through, stay top of mind with ads for about a year.

When a deal doesn't close, it can be for a multitude of reasons. But if the reasons boil down to A) They don't have the budget or B) They went with a competitor, then ads are your friends.

By sending them ads for the first year after a deal falls through, you're banking on one of two things happening: Either they get

the budget they didn't have before, or they experience onboarding headaches with your competitor.

Whatever happens, you want to make sure they remember you!

If they don't bite after a year, it's best to remove them from your ad audiences. This will make sure that your ad ROI remains healthy, and it'll also keep you from becoming a pest. If your prospect really wants to find you again over a year later, then you can always go to the next play: Closed Lost Intent Surge.



Closed lost plays

20. The Surge (Closed lost intent surge)

If a deal falls through, keep tabs on the account.

If the account surges on intent, interacts with your company in some way, or is showing signs of sales readiness in the news and in social media, then that's a great time to pick up the conversation again. After all, maybe they changed their mind.

[It never hurts to check!](#)

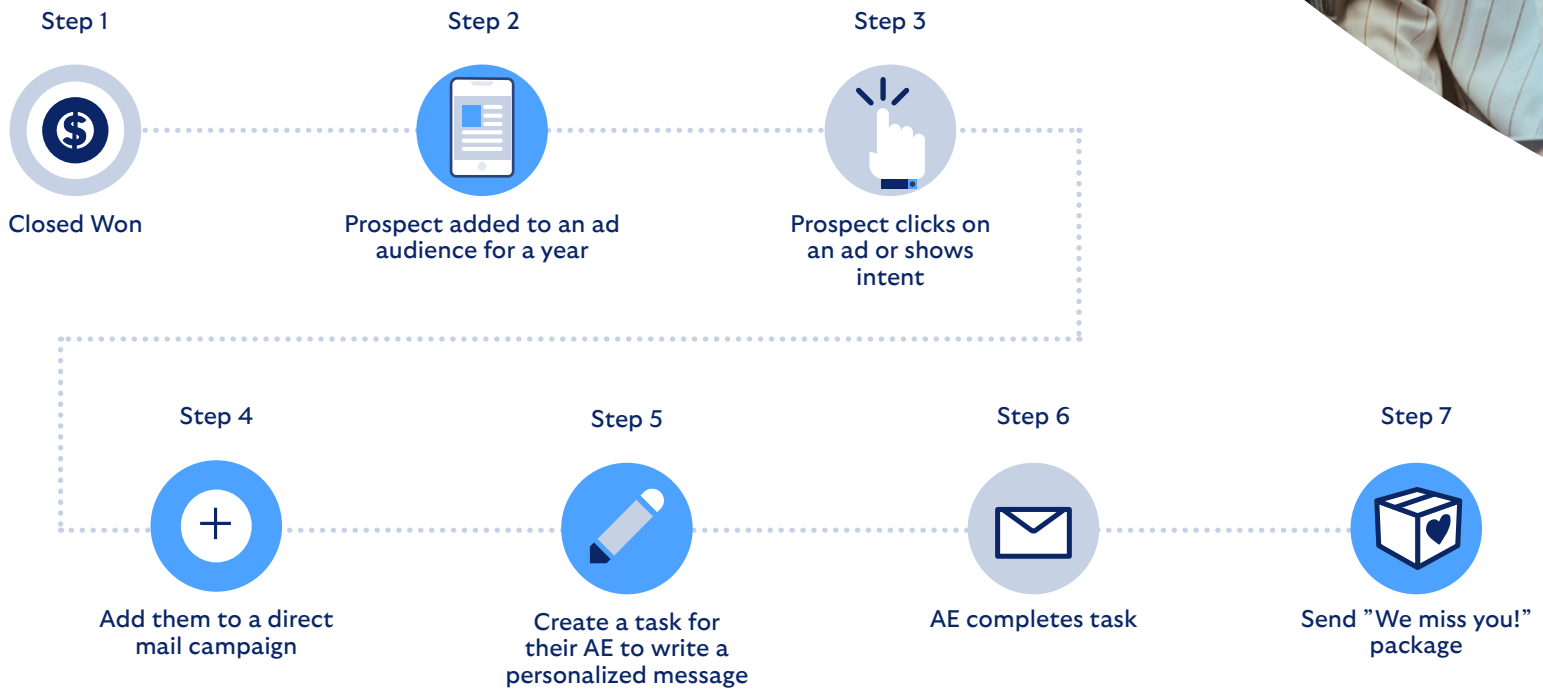


Bonus play!

The End Round (Closed lost direct mail)

This is a great play to use when a prospect from a closed lost deal turns up again, to show that you haven't forgotten about them.

This is a variation on a Hail Mary play, and even the same direct mail package that you use when a prospect goes dark can be used here, as long as you use different messaging.



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?

Orchestrate a smarter omni-channel campaign

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.

Orchestrate a smarter omni-channel campaign

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

Orchestrations are limited only by imaginations.

So don't be afraid to experiment! Use the examples in this playbook in combination—for new, more complex flavors, or create your own plays.

On that note, if you create a play that gives you some good results, give it a name and let us know.

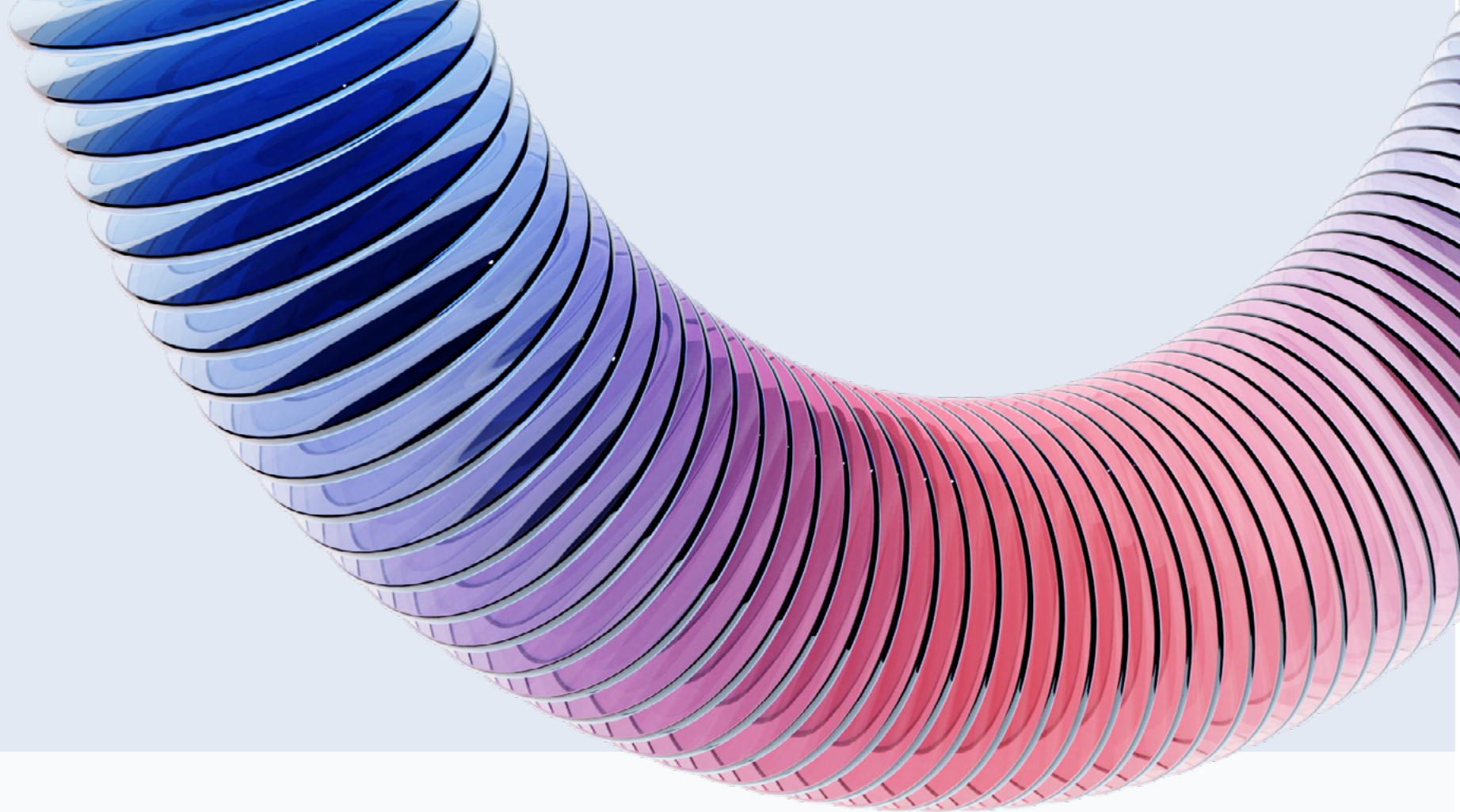
We'd love to hear about it!

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Works Cited

1. [Future Consumer Series: Omnichannel Transformation Begins by Grasping the Key to Consumer Mentalities. Deloitte China. 2020.](#)
2. [10 Notable Omnichannel Trends and Statistics. Stacey Rudolph. Business 2 Community. 2016.](#)
3. [TOPO Summit, Craig Rosenberg and Account Based Everything. Green Leads. 2017.](#)





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.

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