

What to Look for in an

ABM

Platform

(and how to find the
right fit for you)

A large, stylized graphic of an eye or a magnifying glass. It features a dark blue outer ring, a light blue inner circle, and a white pupil. The graphic is positioned on the left side of the slide, with its handle extending downwards.

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3. What do you need in an ABM platform?



Taking a close look at ABM platforms

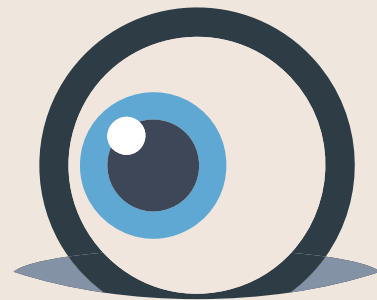
Account-based marketing (ABM) is on all of our minds as B2B marketers. But how do you know if you need an account-based platform? When should you start using software to power your ABM programs? And when you're looking for an ABM platform, what should you be keeping an eye out for?

Whether you just want to be a better marketer or you're already shopping for an ABM platform, we'll guide you through all the decisions you'll need to make, and the pros and cons of different approaches.

We'll walk you through:

- **WHO** should be doing ABM? (and why)
- **WHEN** do you need an ABM platform?
- **WHAT** do you need in an ABM platform?

Who is ABM for?

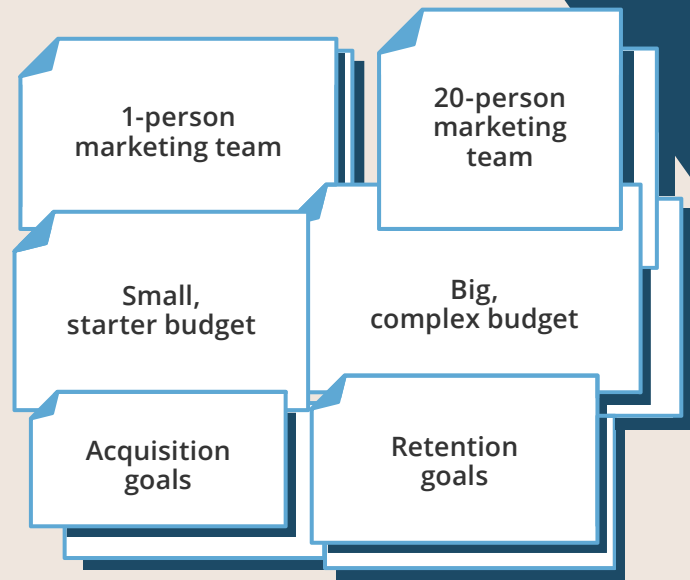


ABM is for you.

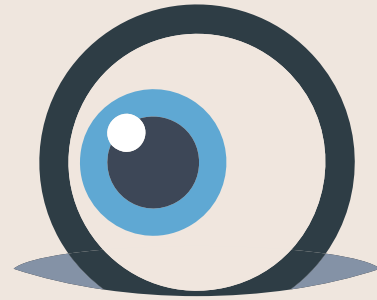
This short answer is: if you're a B2B marketer, ABM is for you. Whether you're a team of one or a team of one hundred, an account-based approach can help you make a bigger impact.

There's been a misconception for a long time that ABM is only for big teams with big budgets, but the truth is: it's for anyone looking to get better results and waste fewer resources. Who **doesn't** want that?

Also: ABM is not only good for demand generation. Retention marketers are using ABM to engage and expand within their existing customer base as well.



**When do you need
an ABM platform?**



ABM fuels growth.

No matter what stage your team or company is at, ABM is the strategy you need to unlock growth. Of course, every company has their own growth goals — some may be trying to penetrate a certain vertical, move into a new market, or simply driving more opportunities for less investment.

The fact is, if you're not doing account-based marketing, your competitors probably are. And that means they might be reaching the best accounts for your business before you do.

So, pretty much no matter your goals, NOW is the time for ABM. But when is the time for an *ABM platform*?



How to know you're ready for an ABM platform

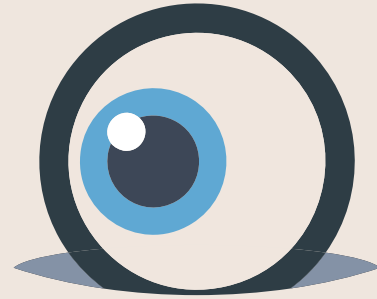
An account-based platform is tech that allows you to objectively identify a data-driven set of target accounts, engage them across channels to turn them into happy customers, and ultimately measure and optimize your efforts.

To know whether you could benefit from an account-based platform, ask yourself these questions:

- Do I need additional data and insights to help me identify the right accounts (and buyers within those accounts)?
- Do I need a streamlined way to reach accounts across channels?
- Do I want to feel more confident that I'm reaching ALL my target accounts?
- Do I need a reliable way to measure account progress?
- And let's be honest, am I tired of doing a lot of manual list building, uploading, and losing track of results?

If you answered yes to any of these questions...it's time to find out which you need in an ABM platform.

**What do you need in
an ABM platform?**





What's under the hood

Once you've understood why and when you'll need an ABM platform, you need to answer the question of what you need in a platform.

There are 5 key areas for you to focus on as you search for the right partner. Some of them are features and functionality you should look for, others focus on how you'll ensure that implementation and execution is easy.

After all, what good is software if you can't figure out how to use it?

5 Things to look for in an ABM platform:

1. Ability to identify ICP & TAL
2. Ability to engage your target accounts
3. Ability to measure results and prove value
4. Ability to integrate seamlessly with other revenue tools
5. Ability to offer customized support and guidance

#1 Identifying ICP & TAL

The foundation of any account-based program comes from a strong target account list (TAL) made up of accounts that match your ideal customer profile (ICP). The right ABM solution will offer a dynamic sync with your marketing automation or CRM databases and can even help expand on these lists by suggesting new accounts that match your ICP.

Once you've integrated your ABM software with your CRM, you'll begin to identify accounts within your current database. You'll want to sort these accounts into lists depending on a variety of different factors.

These factors include firmographic data like company size, industry, and geographic location. But you'll also want to consider behavioral data (intent and engagement signals) as well. The right ABM solution will be able to identify this data and segment your accounts all within one centralized location.

From there, you should be able to use machine learning to prioritize which accounts have the **best** chance of winning for your business — leading to a tiered account list based on probability of close. This is key for a more strategic ABM approach.

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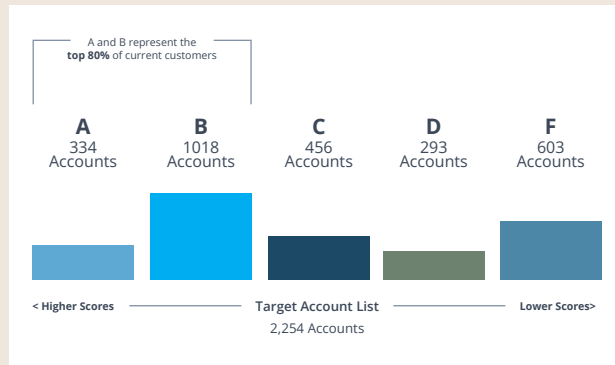
“Analyzing intent signals across many data and content sources of nearly 8000 accounts we were able to surface nearly 3200 target accounts that were showing a surge in intent on topics related to our business.

This is helping us know where to spend the majority of our marketing dollars. We are hoping to shorten the nurture cycle by engaging those surging accounts through targeted digital advertising.”

Jess Bahr
NS1

Question to ask:

- ★ Can the platform identify accounts based on a variety of data, including firmographic and behavioral (engagement and intent) signals?
- ★ Does the platform provide account scoring based on fit and behavioral signals? Is it static or dynamic?
- ★ Does the platform trigger any real-time account alerts based on changes in account behavior?
- ★ Does the platform offer dynamic account lists? Can you segment your target account lists by firmographic or behavioral attributes?





Real marketing problems

In early 2020, PitchBook set aggressive sales and revenue goals—objectives that translated into a need for the marketing team to generate substantially more leads. The sales team was also required to accelerate activity, with reps now expected to take a more account-based approach to their prospecting.

And then the global pandemic and its economic effects meant that the list of companies fitting PitchBook's ideal customer profile (ICP) was evolving quickly, making it hard to keep up with who they should be targeting. Buyers have also been distracted in 2020 (no surprise) so the team was dealing with extended sales cycles that required more touchpoints to generate opportunities.

Real ABM solutions

PitchBook layered RollWorks's account scoring on top of their ever-changing ICP to prioritize marketing and sales resources. PitchBook used our machine learning technology to build a custom predictive model which scored a list of 2,000 accounts based on ICP fit. The result was a 300-account list of higher probability prospects on which they focused their spend.

In just 3 months PitchBook saw:

- **170% increase in opportunities**
- **79% increase in website visits by target accounts**
- **220% increase in accounts engaging with their brand**

#2 Engaging target accounts

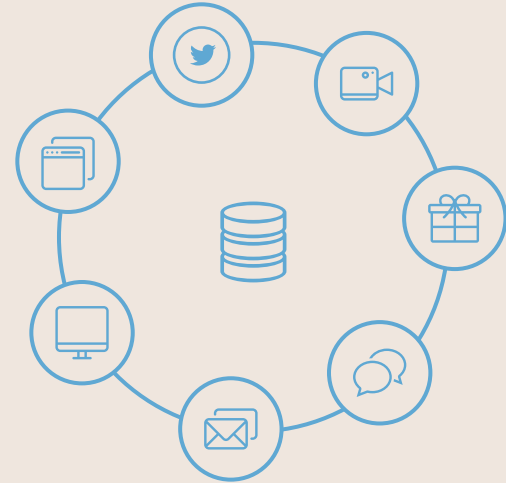
According to Gartner, the typical B2B buying process includes six to 10 different decision-makers. Each of these individuals will gather their own information independently, and then they'll have to reconcile this as a group. This is why the B2B sales cycle can sometimes take months or even years to complete.

The right ABM software will engage the full buying committee at your target accounts. A good platform will enable engagement through digital ads, retargeting, automated sales outreach, and other channels like direct mail / gifting, email signature banners, and personalized content experiences.

Depending on where you are in your ABM journey, this could be as simple as working with a few channels to start and then scaling to a full multi-channel approach to your tiered target account list. You should be able to have flexibility based on sales stage, personas, and other information to tailor your messaging to be perfect for your intended accounts.

Question to ask:

- ★ Does the platform offer multiple channels for engaging accounts, either through native capabilities or partnerships? (digital ads, paid social, email, web, chat, gifting, etc)
- ★ Can you personalize campaigns within the platform (personalized ads & landing pages / content experiences) either through native capabilities or partnerships?
- ★ Does the product allow you to engage accounts based on their stage in the funnel?
- ★ What kind of reach does the platform's digital advertising offering have?



blackbaud™

Real marketing problems

After years of discussion, Blackbaud decided it was finally time to launch their first display ABM program.

The marketing and sales teams were excited to test what they could do with an account-based platform. Blackbaud sells more than 40 products to 9 verticals — so everyone was hungry to scale their account-based efforts as quickly as possible. So, what did they do? They started testing some of the best proven digital channels to see what would happen.

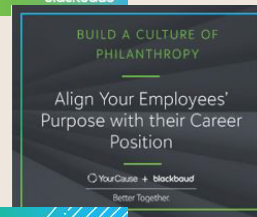
In just 3 months Blackbaud saw:

- **94% of target account engaged***
- **190% increase in engaged* visitors**
- **10x ROI on pipeline generation**

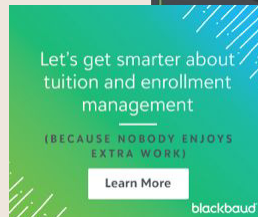
Real ABM solutions



Campaign: Pure prospecting
Goal: New visitors



Campaign: Previous lost deal
Goal: Re-engagement



Campaign: Cross-sell
Goal: New opportunities

#3 Measuring your results

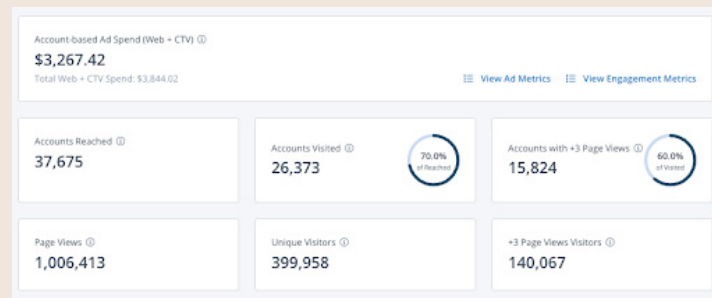
No marketing strategy is complete unless you have a way to measure and evaluate your results. Ultimately, companies are becoming more account-based as a way to influence pipeline and revenue associated with target accounts.

This presents an increasingly challenging measurement landscape. Most marketers have tools that enable campaign performance measurement around leads, not critical account-based metrics. And once you bring both sales and marketing actions into the mix? Showing mutual impact can prove a little more complex.

That's why it's incredibly important for your ABM platform to give you the metrics you need to on an account and campaign level — all the way from unaware to aware to engaged to closed.

Questions to ask:

- ★ Does the platform offer account and campaign-level measurement capabilities?
- ★ Can you build your own reports and dashboards?
- ★ Can you measure account progression?



NS1.

Real marketing problems

Accompanying the launch of a new NS1 product was an organizational restructuring, which saw the sales department split into two separate entities. Unlike other groups however, the marketing team remained untouched and thus had the challenge of figuring out how to serve two sales teams focused on entirely different lines of business.

The team, lead by Jess Bahr, decided not only to alter their overall marketing mix to focus more on digital, but- more fundamentally- to adopt an account-based strategy to deliver persona-specific content directly to targeted accounts.

But with this new focus, came new challenges: how to show results for account-based programs?

Real ABM solutions

With the RollWorks Measurement Solution NS1 was able to show a 498% lift in unique visitors from target accounts, 69x growth in new pipeline creation, and over 3x ROI on influenced revenue.

“We are a very data-driven organization and it’s critical to have a robust reporting platform that will provide you with crucial insights into what content they’ve downloaded, campaigns that are getting leads to convert, and what ads they’ve clicked on” said Jess.

“So, that’s been huge, turning data into actionable insight and showing marketing’s impact to driving pipeline deals.”

#4 Integrations

Gartner research shows that marketers use only 58% of their existing technology capabilities. That means marketers are trying to get smarter about just how complex their 'all-in-one' platforms need to be. Instead, they'll be looking to 'pick-and-choose' what channels and capabilities they need, and ideally orchestrate their different solutions into a bespoke system that works for them.

Your ABM software should be able to integrate with your current customer relationship management (CRM) and marketing automation platform (MAP) software. This way you can pull data in from your CRM and MAP, and track activity and results across sales and marketing programs. Better yet, look for an abm platform that partners with other best-in-class martech tools, data providers, and engagement platforms, to give you a full suite of capabilities without needing an expensive all-in-one solution.

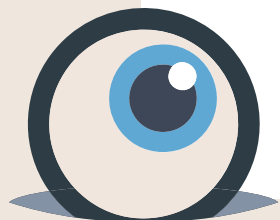
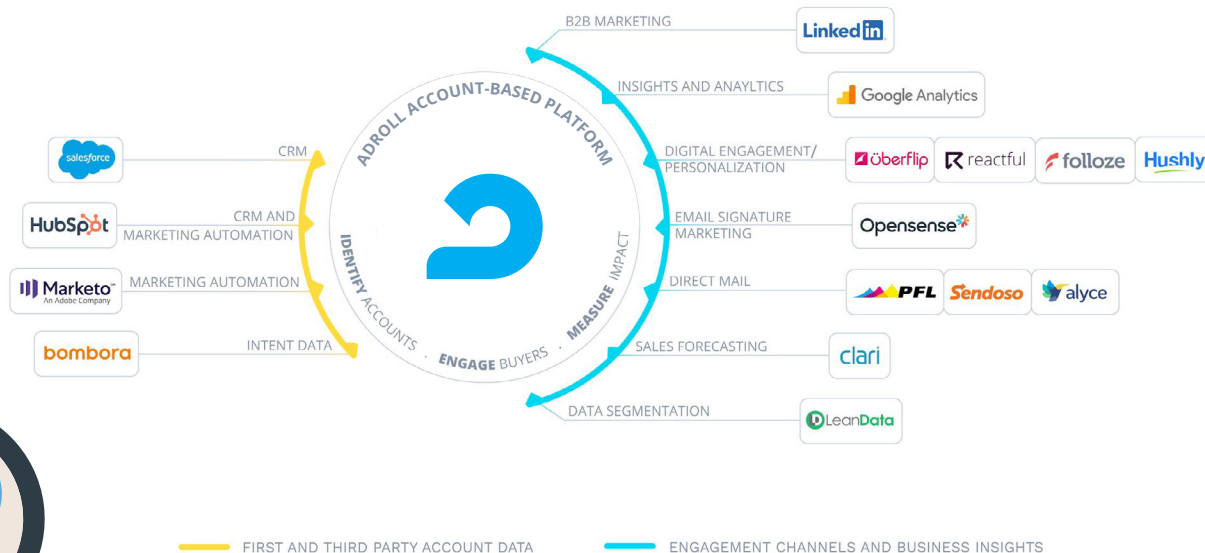
Question to ask:

- ★ Which marketing technologies does the ABM platform integrate with? Think CRM, MAP, web-site personalization chatbots, email automation, gifting platforms, etc.
- ★ Are these integrations bi-directional?



A peek into the partner universe

RollWorks Partner Ecosystem



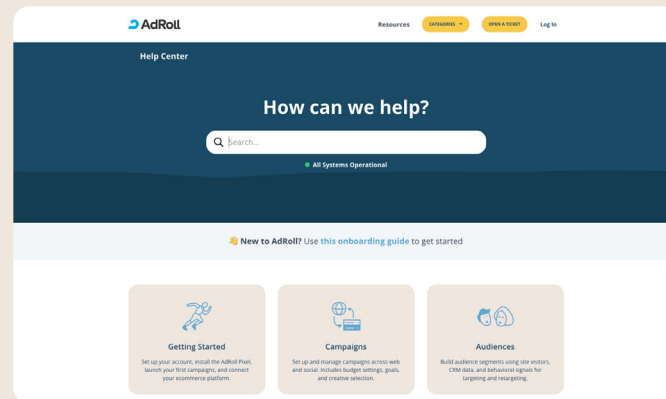
#5 Support

Any software platform is only as good as what you get out of it. And a great customer support or customer success team can help you get the most out of your ABM platform. The best choice will be an ABM platform that is as focused on your success as you are. Look for a company that has a team of experts to help you launch effective campaigns and optimize your programs.

This is especially true in the realm of ABM—after all, there's still some confusion around how to best execute and measure against your goals. Which channels should be driving quick returns and which others require a little more patience? What have other marketers done that give quick wins or save budget? This is the kind of advice a team of ABM experts can lend you. Not to mention, make sure your ABM platform has a community of like-minded marketers to share ideas with. This will be a springboard for creative solutions to not only ABM, but the product you're using every single day.

Question to ask:

- ★ What type of onboarding and training is offered?
- ★ Does the platform offer real-time support via email or chat?
- ★ Can you get strategic consultation from your customer success manager?
- ★ Is there a community for you to reach out to other marketers using the platform?



“

I was blown away by how my account manager was able to provide me the exact reporting we needed. The sales team was able to see in Salesforce which accounts appeared the most interested and prioritized their time working those accounts.”

Jess Bahr
NS1

Cheat sheet: 5 ABM platform must-haves

Identifying your ICP & TAL

- ☐ Identifies accounts with various sources of data (firmographic and behavioral signals)
- ☐ Provides account scoring based on fit and behavioral signals? Static or dynamic
- ☐ Triggers real-time account alerts based on changes in account behavior
- ☐ Offers dynamic account lists. Can you segment your target account lists by firmographic or behavioral attributes

Engaging your target accounts and buyers

- ☐ Offers multiple channels for engaging accounts, either through native capabilities or partnerships (digital ads, paid social, email, web, chat, gifting, etc)
- ☐ Can personalize campaigns within the platform (personalized ads & landing pages/content experiences) either through native capabilities or partnerships
- ☐ Allows you to engage accounts based on their stage in the funnel
- ☐ Has broad reach to target accounts

Measuring results and proving value

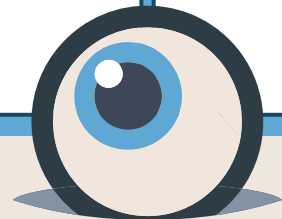
- ☐ Offers account and campaign-level measurement capabilities
- ☐ Allows you to build your own reports and dashboards
- ☐ Allows you to measure account progression

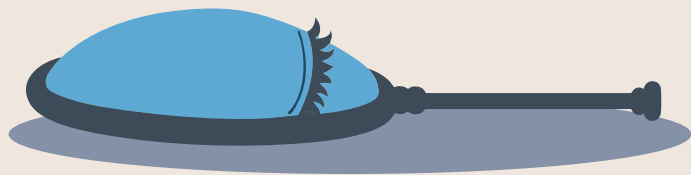
Integrations with other revenue tools

- ☐ Integrates with other tech like CRM, MAP, web-site personalization chatbots, email automation, gifting platforms, etc.
- ☐ Allows for bi-directional integrations

Customized support and guidance

- ☐ Provides onboarding and training
- ☐ Offers real-time support via email or chat
- ☐ Provides strategic consultation from your customer success manager
- ☐ Engages with a community for you to reach out to other marketers using the platform





OK, that was a lot.
Time to rest your eyes.