

EBOOK

ABM Success Blueprint: A Workbook for Aligning Teams

DEMANDBASE



EXPLORE

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1 Choosing the Right ABM Approach

Account-Based Marketing (ABM) isn't just a tactic—it's the ultimate growth engine for modern B2B revenue teams. Gone are the days when ABM was a niche program living solely within marketing. Today, it's a business-critical strategy that aligns sales and marketing around shared goals, driving precision, efficiency, and measurable impact.

But here's the thing: ABM thrives on alignment. When teams collaborate early, identifying shared objectives and leveraging data-driven insights like account behaviors and sales conversations, they unlock a level of impact that traditional approaches can't touch. This workbook is your post-RKO guide to taking that alignment from theory to action—fast.

Together, we'll explore how to evolve ABM from a standalone program to a strategic growth driver. With practical frameworks, interactive exercises, and proven insights, this guide will help your team execute with clarity and confidence.

Because when ABM is done right, anything's possible.

Key Considerations

Choosing the right ABM style is key to shaping your results.

Want to break into new markets or industries? Go big with one-to-many ABM for maximum reach and efficiency.

Focused on keeping your best customers happy?

One-to-few or one-to-one ABM builds deeper connections, boosts advocacy, and keeps retention strong.

Need to close those high-value deals faster?

One-to-one ABM delivers the hyper-personalized attention those accounts demand.

And don't forget: resources matter. If your sales and marketing teams are stretched thin, some ABM strategies might be out of reach. Align your ABM approach with your growth goals, pipeline priorities, and team capacity to drive real, measurable impact.

Overview of ABM Types

There are three distinct types of Account-Based Marketing practices which have broadened its appeal and provided more ways for companies to get started. Two-thirds of ABMers are implementing just one approach and only 12% are implementing all three.

One-to-One: A dedicated, senior-level marketer works in full partnership with the account team and creates highly customized marketing programs for “markets of one.”

One-to-Few: Taking the research-based principles of One-to-One and applies them to larger groups of accounts. This approach typically brings together clusters of 5-15 accounts with similar business issues, often in the same industry.

One-to-Many: Emphasizes personalization at scale. This approach typically addresses a strategically curated target account list of several hundred or more named accounts. In order to achieve this level of scale, technology needs to play an important role.

The type of ABM practiced depends on many factors including how valuable the account is or resources available to you. As you plan for your ABM, you should be considering which you want to incorporate. The good news is you don't have to pick just one. According to ITSMA and the ABM Leadership Alliance research, 65% of companies are only doing one type of ABM, yet the highest performing companies have chosen a blended approach.

One-to-One	One-to-Few	One-to-Many
<p>Targets individual accounts (1-10 high-value accounts with significant revenue potential).</p>	<p>Targets small clusters of 5-10 accounts with similar needs or industry focus</p>	<p>Targets hundreds or thousands of accounts with shared characteristics. approach.</p>
<p>Best Fit:</p> <p>Ideal for enterprises with complex sales cycles and high-ticket deals.</p>	<p>Best Fit:</p> <p>Ideal for mid-sized companies aiming for a balance of personalization and broader reach.</p>	<p>Best Fit:</p> <p>Ideal for larger companies aiming for broad outreach and lead generation at scale.</p>
<p>Personalization Level:</p> <p>Very high; tailored campaigns for each account.</p>	<p>Personalization Level:</p> <p>Medium; tailored campaigns for groups rather than individual accounts.</p>	<p>Personalization Level:</p> <p>Low; messaging focuses on broader needs & pain points shared by large groups.</p>
<p>Resource Needs:</p> <p>High. Requires a dedicated ABM team.</p>	<p>Resource Needs:</p> <p>Moderate effort and resources compared to 1:1 ABM</p>	<p>Resource Needs:</p> <p>Relies on programmatic advertising & automation for efficiency.</p>
<p>When to use:</p> <p>Targeting large corporations with complex buying processes.</p> <p>Selling high-priced products/services requiring significant customer investment.</p>	<p>When to use:</p> <p>Targeting segments of high-value accounts with shared characteristics.</p> <p>Companies with moderate budgets and resources looking for a scalable ABM approach.</p>	<p>When to use:</p> <p>Targeting wide markets with the need for scalable campaigns.</p> <p>Companies with large sales teams and ambitious growth goals.</p>
<p>Benefits:</p> <p>Deeply personalized engagement with high-value accounts.</p> <p>Higher win rates for complex, high-ticket deals.</p> <p>Clear, measurable ROI on strategic accounts.</p>	<p>Benefits:</p> <p>Balances personalization with scalability for small account clusters.</p> <p>Drives engagement with tailored content for accounts with shared needs.</p> <p>Ideal for targeting high-value segments with moderate budgets.</p>	<p>Benefits:</p> <p>Balances personalization with scalability for small account clusters.</p> <p>Drives engagement with tailored content for accounts with shared needs.</p> <p>Ideal for targeting high-value segments with moderate budgets. approach.</p>

Planning exercise: Aligning ABM styles to support your objectives

What are your ABM objectives?

Objective	One-to-one	One-to-few	One-to-many

How do the different styles of ABM address your corporate objectives?

Objective	One-to-one	One-to-few	One-to-many
Opening new markets in different industries			
Innovating new solutions			
Developing new reference accounts			
Ensuring customer success			
Changing perceptions or positioning			
Other:			

2

Constructing and Validating Your Target Account List

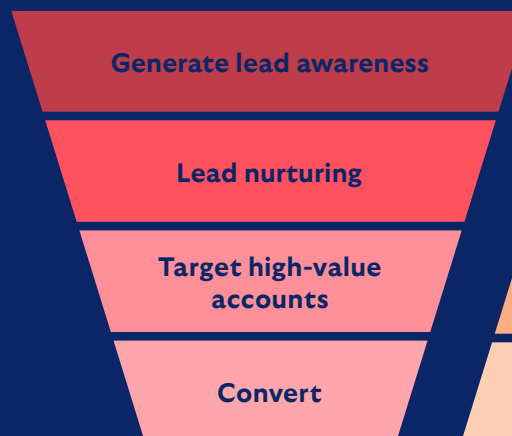
Your target account list is the foundation of your ABM strategy. If you get it wrong, everything else—your campaigns, your messaging, your results—falls apart. Get it right, though, and you'll give your team the focus and clarity they need to drive measurable impact.

This isn't about guessing or going after the biggest companies in your database. Constructing your list requires a strategic blend of data, insights, and collaboration. It's about identifying the accounts with the highest potential and validating your choices with the sales team to ensure alignment from day one.

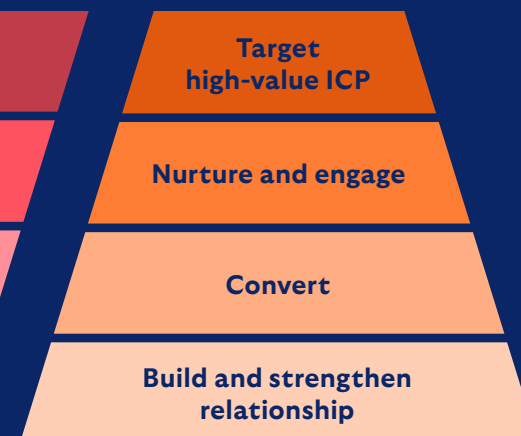
Let's talk about how to build a list that sets your ABM efforts up for success.



Traditional Funnel



ABM Funnel




Defining Your Target Account List

A target account list consists of the companies with the most potential to your business—which can include customers, prospects, or partners (or a mix of all three). The target account list helps to align your resources, create shared focus across sales and marketing, and facilitate compliance.

While many companies have a target account list, it is often created by sales and thrown over the wall to marketing, but having a list is not enough. Since the target account list at the center of ABM, it's crucial that the list contains the right accounts.

To build your list, start with these steps.

1. **Evaluate current customers:** Analyze your existing customer base to identify patterns of success and use these insights to create a lookalike model for similar high-value prospects.
2. **Leverage named accounts:** Include named accounts that align with your strategic priorities, such as key verticals or industries critical to your business goals.
3. **Use data for validation:** Generate an initial list using intent signals and firmographic data, then collaborate with your sales team to validate and refine the accounts based on frontline insights and readiness indicators.
4. **Incorporate account identification technology:** ←  Leverage advanced tools to pinpoint high-value accounts demonstrating buying intent and identify key decision-makers within those accounts for targeted engagement.

Building an effective target account list isn't just about looking backward—it's about anticipating the future. Balancing historical data with predictive insights is key to identifying not only accounts with proven potential but also emerging opportunities that can drive long-term growth.

Start by analyzing historical data from your CRM or sales records to identify patterns among accounts that have delivered high-value deals. Look for shared attributes such as industry, company size, or buying behaviors that signal a strong fit with your solutions.

Next, layer in predictive insights to spot accounts that may not yet be on your radar but are showing early buying signals. Tools that analyze intent data—such as keyword searches, competitor research, or engagement with industry-specific content—can highlight accounts actively exploring solutions in your space. For example, if an account is researching a challenge your product solves, it signals a potential opportunity even if they're not currently in your pipeline.

For example, use tools like Demandbase to track accounts visiting your website or engaging with industry-specific content. This combination of firmographics and intent ensures your list focuses on high-potential accounts showing immediate readiness to engage, maximizing the impact of your ABM efforts.

Combining these two perspectives ensures your list is both grounded in proven success and forward-looking. This balanced approach helps you capture immediate wins while laying the groundwork for future growth, ensuring your ABM strategy remains dynamic and responsive to market shifts.

Use Sales Call Insights to Validate and Prioritize Target Accounts

Sales call data and other engagement insights play a critical role in validating your target account list and prioritizing accounts for maximum impact. By analyzing sales calls, emails, and meeting notes, you can uncover key signals that indicate an account's readiness to engage. Look for patterns like high levels of stakeholder (particularly decision maker) interaction, consistent discussion of shared pain points, or strong alignment between the account's challenges and your solutions.

For example, accounts where decision-makers are actively engaging in conversations, asking detailed questions, or expressing interest in solutions similar to yours should rise to the top of your priority list. Platforms like Gong can help analyze customer interactions, uncover objections, and surface trends across accounts, providing actionable insights to refine your strategy.

This approach ensures that your efforts focus on accounts with the highest potential for conversion, aligning sales and marketing around the signals that matter most and driving more effective execution. When sales and engagement data validate your prioritization, your ABM efforts are backed by real-world insights, giving your team the confidence to act with precision.



Revenue AI platforms, like Gong, can be leveraged alongside intent data to get a more complete picture of where customers stand in their buying cycle. With AI powered call summaries and activity timelines stakeholders across sales and marketing can stay aligned and easily collaborate on the most effective approach to moving a deal forward.

The screenshot displays the Gong interface, which organizes communication into a vertical timeline. At the top, a date separator indicates 'Monday, Jul 11'. The timeline includes a message from Esther Howard (VP of Sales Enablement) at 3:50 pm, stating 'I love when Gong sends mt stamps of any action item that I promised to my prospects.' and 'Updated Proposal for Taboola via Taboola'. Below this is a message from Melanie Moy (Sr. Director, Marketing) at 4:35 pm, stating 'Hi Yehuda, I was able to catch my VP shortly after we talked and he approved the attached...' and 'Updated Proposal for Taboola'. A vertical line with icons (lightning bolt, envelope, phone) connects these messages. Below the timeline, a section titled 'Netrix & Wonka, Commercial Discussion' (12m) lists participants: Elizabeth White (VP of Sales Enablement) and Michelle McConville (Account Executive, +3 more). Under the heading 'Call brief', it states: 'Netrix Corporation is evaluating multiple tools to solve their problem of reps being enabled to sell multiple products, including Clara, Globex, Initech, and Hooli. They need a tool that can provide historical data and reports, automate processes, and provide actionable insights.'

How does your list measure up?

Scrutinize your list based on the answers to these questions

1. What is the ideal profile for your buyers (industry, revenue range, employee range, etc.)?

2. What factors determine your most valuable customers?

3. What factors would indicate possible buying interest (e.g. Trade show attendee, new hires, web site visits, demo requests, content download)?

4. What current year business objectives would direct you to address certain segments of your target list sooner rather than later?

Is your list the right size?

This size of your list can impact efficiency. This calculator will help determine what you should shoot for.

Step 1: Closed/Won per Rep

$$\begin{array}{c} \text{Annual Quota} \\ \text{per Rep} \end{array} \times \begin{array}{c} \text{Quota from} \\ \text{TAL} \end{array} \times \begin{array}{c} \text{Average} \\ \text{Deal Size} \end{array} = \begin{array}{c} \text{Closed/Won/} \\ \text{Rep from TAL} \end{array}$$

Step 2: Pipeline Opportunities

$$\begin{array}{c} \text{Closed/Won/} \\ \text{Rep from TAL} \end{array} \times \begin{array}{c} \text{Close Rate} \end{array} = \begin{array}{c} \text{Total Pipeline} \end{array}$$

Step 3: TAL per Rep

$$\begin{array}{c} \text{Total Pipeline} \end{array} \times \begin{array}{c} \text{Conversions} \end{array} = \begin{array}{c} \text{Total Accounts} \end{array}$$

Step 4: Total TAL

$$\begin{array}{c} \text{Total Accounts} \\ \text{Needed} \end{array} \times \begin{array}{c} \text{Reps} \end{array} = \begin{array}{c} \text{Total TAL Size} \end{array}$$

You may need to do separate calculations for different parts of your sales team such as SMB, Enterprise, Verticals, etc. and add them up to get your total Target Account List.

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Identifying the KPIs That Actually Have Impact

In ABM, success isn't just about activity—it's about outcomes. To ensure your efforts are delivering real business value, you need to focus on the KPIs that align with your strategic objectives and resonate across sales, marketing, and operations teams. Measuring the right metrics can help you track progress, refine your strategy, and align your revenue team around shared goals.

This chapter will guide you through identifying impactful KPIs, differentiating between leading and lagging indicators, and designing dashboards that foster alignment and accountability.

If You Can't Measure It, You Can't Win It

ABM is a precision strategy. Unlike traditional marketing, where success is often tied to activity metrics (like impressions or clicks), ABM emphasizes account-based outcomes. This shift requires identifying KPIs that matter to both your GTM strategy and your stakeholders.

Focusing on outcome-based metrics helps you measure impact at every stage of the customer journey—from early-stage engagement to closed deals.

Activity-Based Metrics

Email opens, clicks,
and form fills

Website visits

Ad impressions and
click-through rates

VS

Outcome-Based Metrics

Account engagement scores

Pipeline velocity for
target accounts

Account-level win rates
and deal sizes



The Two Types of KPIs: Leading vs. Lagging Indicators

ABM success relies on balancing leading indicators that show early progress and lagging indicators that reflect long-term results.

Leading indicators—Leading indicators are predictive metrics that signal future performance. These metrics are especially valuable for understanding the early impact of your ABM efforts.

- **Engagement Spikes:** Accounts interacting with your website, emails, or ads.
- **Intent Signals:** Increased research on topics relevant to your solutions.
- **Stakeholder Activity:** Engagement from key decision-makers within target accounts.

Lagging indicators—Lagging indicators track outcomes after significant milestones, such as closed deals or retained customers. While they provide clear evidence of success, they're not as actionable in real-time.

- **Win Rates:** Percentage of target accounts converted to customers.
- **Average Deal Size:** Revenue generated per deal for target accounts.
- **Pipeline Velocity:** Speed at which opportunities progress through the sales cycle.

Aligning Sales, Marketing, and Ops Around Metrics

Misalignment often arises when teams focus on different definitions of success. For ABM to succeed, sales, marketing, and operations must agree on shared metrics and how to interpret them.

Creating Unified Dashboards—Unified dashboards help teams monitor performance and stay aligned. The best dashboards are:

- **Focused:** Highlight metrics that matter most to your ABM strategy.
- **Real-Time:** Allow teams to act quickly on engagement signals or pipeline shifts.

Collaborative Metric Reviews—Set regular meetings to review KPIs across teams. Use these discussions to:

- Celebrate wins (e.g., a high-priority account reaching a key milestone).
- Address bottlenecks (e.g., accounts stuck in late-stage negotiations).
- Refine your approach based on new data and insights.

Analyzing Qualitative & Quantitative Data

Quantitative KPIs tell you what's happening, but qualitative insights—such as sales call sentiment or stakeholder buy-in—reveal why it's happening. Combining the two gives a complete picture of your ABM efforts.

Call Sentiment and Themes—Analyze call recordings to identify patterns. Are stakeholders raising similar objections? Are champions expressing confidence in your solution? Platforms like Gong can surface these insights at scale.

Stakeholder Buy-In—Track how many stakeholders from your target accounts are engaging. ABM thrives when buying committees are activated, so monitoring multi-stakeholder engagement is critical.

Set your benchmarks

What are your benchmarks for these key goals?

Win/loss rates

<input type="text"/>	Increasing rates?	<input type="radio"/> Yes	<input type="radio"/> No
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Annual contract value

<input type="text"/>	Increasing value?	<input type="radio"/> Yes	<input type="radio"/> No
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Annual contracts from direct marketing sources

<input type="text"/>	Increasing value?	<input type="radio"/> Yes	<input type="radio"/> No
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Marketing supported ACV-rate

<input type="text"/>	Increasing rates?	<input type="radio"/> Yes	<input type="radio"/> No
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Funnel velocity

List your funnel stages and the average time spent on each:

<input type="text"/>	<input type="text"/>
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Metric assessment

Evaluate each of your market functions through an account lens to help you determine metrics gaps and effectiveness.

Website

<input type="text"/>	Visits from target accounts
<input type="text"/>	Target accounts per quarter
<input type="text"/>	Pages per session for target segment
<input type="text"/>	Conversion rate of target segment

Demand generation

<input type="text"/>	Target accounts attending live and digital events
<input type="text"/>	Target accounts engaged with advertising; channels driving to site; opportunities demand is driving

Field marketing

<input type="text"/>	Number of target accounts attending events
<input type="text"/>	Number of opportunities driven by Field Marketing

Cities with the highest concentration of target accounts:

<input type="text"/>

4

Activating ABM Across GTM Channels

Once your target account list is finalized and your KPIs are established, it's time to bring your ABM strategy to life. Activating ABM across go-to-market (GTM) channels is where the work of alignment, data insights, and strategic planning translates into tangible results. Each channel—whether advertising, your website, or events—presents unique opportunities to engage accounts and drive impact when tailored for ABM.

Optimizing Key Channels for ABM Success

Each GTM channel plays a distinct role in your ABM strategy, and activating these channels effectively requires careful customization.

Advertising

Personalized Campaigns at Scale—ABM advertising goes beyond broad awareness campaigns. It's about delivering hyper-relevant messages to the right accounts at the right time.

Best Practices:

Use Intent Data for Targeting: Leverage intent signals to identify which accounts are actively researching your solutions or related topics. Target ads to those accounts with messaging tailored to their stage in the buying journey.



Dynamic Creative Personalization: Adapt ad content to resonate with specific industries, personas, or even individual accounts. For example, highlight industry-specific use cases or offer solutions to pain points identified through sales conversations.

Monitor and Optimize: Continuously track ad performance metrics, such as account-level engagement and CTRs, and adjust targeting or creative as needed.

Web marketing

Tailoring Experiences for Account Relevance—Your website is a key touchpoint for ABM success. Personalized web experiences can significantly improve account engagement and conversion rates.

Best Practices:

Account-Specific Content: Create dynamic web pages or banners that display tailored content when target accounts visit. For example, feature case studies from their industry or highlight their logo with a customized message.

Behavioral Tracking: Use tools to monitor how specific accounts interact with your website. This data can inform follow-up strategies, such as which assets to share in sales outreach.

Clear CTAs for Each Stage: Align calls-to-action (CTAs) with the account's position in the buyer journey, from awareness to consideration to decision.

Field marketing

Just because Field Marketing is aligned with Sales doesn't mean it's account-focused. Plans are often derived based on Sales or regional requests rather than focusing on overall ABM strategy. ABM the channel by mapping the locations of your target account list and using this as a way of proactively creating your strategy.

Create a list of cities you can reasonably cover based on your budget and headcount and tier the list based on account density.

Build programs in conjunction with Sales to help establish a consistent presence within your key cities, run programs that provide momentum, and satisfy pipeline generation.

Events and webinars

Events—whether in-person or virtual—are where ABM comes alive. But here's the secret: they're not about volume. They're about creating real, meaningful connections with your target accounts.

Skip the mega-conferences unless they're packed with your high-priority accounts. Instead, focus on account-specific experiences. Private dinners. Executive roundtables. Industry panels. These aren't just events—they're opportunities to get in front of decision-makers and build trust.

Keep the momentum going while the experience is fresh in their minds. Follow up with purpose. Send personalized content based on the sessions they attended or the conversations you had.

Best Practices:

Account Density Analysis: Prioritize events in locations or industries with a high concentration of target accounts.

Exclusive Experiences: Host small, account-specific events to deepen relationships with key stakeholders. For example, private dinners or executive roundtables can be highly effective.

Pre- and Post-Event Engagement: Tailor pre-event outreach to encourage attendance from high-priority accounts and follow up post-event with personalized content or next steps.

Leveraging Feedback Loops for Continuous Improvement

ABM isn't a one-and-done game. Every campaign, every channel, every touchpoint generates data. The best teams don't just run campaigns—they study them, learn from them, and get better.

Use feedback loops to make your GTM channels smarter. If a campaign flopped, dig into why. Was the messaging off? Was the timing wrong? Was the audience poorly defined? On the flip side, if something worked, scale it. ABM is about constant iteration—refining your approach until every dollar spent delivers impact.

Some data sources to monitor include:

Engagement Metrics: Track which accounts are interacting with your content and where they're dropping off.

Sales Feedback: Gather insights from sales teams on the quality and relevance of marketing-driven engagements.

Conversion Data: Identify which channels are driving accounts to the next stage of the buyer journey.



Channel audit

Are you leveraging the right channel mix? Consider your ABM program goals and audit your programs and tactics.

Define ABM program goals

- ☐ Identify leading and lagging indicators
- ☐ Shift the mindset to an Account-based perspective

Establish a baseline

- ☐ Define ABM program goals
- ☐ Establish baseline of current tactics
- ☐ Review target account list

Evaluate tactics

- ☐ Focus demand generation activities on accounts vs. leads
- ☐ Ensure program alignment with Sales
- ☐ Utilize account-based strategies to prioritize which events to sponsor
- ☐ Create a target account list for webinars and direct mail campaigns

Measure and iterate

- ☐ Schedule meetings
- ☐ Meetings and phone calls completed
- ☐ Pipeline closed

Advanced considerations

If you've already implemented the right channel mix, are there opportunities to optimize the mix?

Optimize current mix

- ☐ Leverage partners for a coordinated campaign
- ☐ Audit your existing content
- ☐ Monitor target account social media activity
- ☐ Segment your website audience and personalize experiences

Measure and iterate

- ☐ Calculate ROI
- ☐ Identify high-value segments
- ☐ Initiate Sales team follow-ups

5

Aligning Budgets with ABM Strategy

Let's talk about money. ABM isn't just a shift in how you think about targeting accounts—it's a shift in how you invest your resources. Gone are the days of pouring budget into broad campaigns and praying for results. With ABM, every dollar should drive precision, impact, and revenue. This chapter is all about making your budget work as hard as your strategy.

ABM isn't cheap. But it's also not wasteful. The days of bloated spend on volume-based tactics are over. When done right, ABM is efficient, targeted, and delivers the kind of ROI that makes your CFO smile.

Stop Throwing Money at Everything

Traditional marketing budgets are often based on volume. The bigger the audience, the bigger the budget, right? Wrong. ABM is the complete opposite. It's about targeting a select group of high-value accounts and delivering highly personalized experiences—not casting a wide net.

If you're still spending most of your budget on broad, untargeted activities like banner ads and mass email blasts, it's time for a shift. You need to reallocate that spend to smaller things that matter. Focus on the accounts that are the best fit for your business, and ensure that every dollar spent is driving impact within that targeted group.



Why ABM Requires a Budget Shift

Personalization Costs

Customizing content and campaigns for individual accounts or account clusters requires additional time and resources.

Targeted Tools

ABM relies on specialized platforms for intent data, personalization, and orchestration.

Cross-Functional Coordination

Successful ABM often involves co-funded tools, events, or programs that span marketing, sales, and operations.

Make the Case for Cross-Functional Investment

ABM is a team effort, and that means your budget needs to reflect cross-functional support. Sales, marketing, and operations all need to be aligned and invested in the success of your ABM program. If you're working in a silo, you're missing out on major opportunities. Here's how you make it happen:

Show the ROI: Use data to demonstrate how ABM delivers better returns than traditional marketing methods. Prove how targeting fewer, high-value accounts leads to larger deals and faster sales cycles. When you show the numbers, people listen.

Collaborate on Tools: ABM isn't just a marketing initiative—it's a company-wide strategy. Make the case for co-investing in tools that serve everyone. Maybe it's a shared ABM platform that connects sales and marketing, or platforms like Gong that deliver insights on customer interactions. Get everyone on board.

Pilot Programs: If your stakeholders are hesitant, start small. Run a pilot with a subset of high-value accounts, track the results, and use that data to expand your budget and efforts. There's no better way to prove ABM's worth than with hard data.

Reallocating Resources: To make the most of your budget, consider shifting funds from broad, low-impact activities to targeted ABM efforts:

Generic, high-volume lead generation
Personalized account engagement



Broad-based campaigns
Intent-driven campaigns



General industry events
Account-focused events



Leveraging Experimental Budgets

If cross-functional budgets are limited, propose an experimental approach:

- **Start Small:** Begin with a pilot program targeting a limited number of accounts.
- **Track and Report:** Monitor KPIs and share results to build confidence in scaling the program.
- **Expand Gradually:** Use the pilot's success to justify incremental increases in budget and scope.

Data-Backed Insights to Justify Reallocations

Numbers speak volumes when advocating for budget shifts. Use data to build a compelling case for investing in ABM:

- **ROI Comparisons:** Show how ABM efforts outperform traditional campaigns on key metrics like deal size and win rates.
- **Pipeline Conversion Rates:** Highlight how ABM shortens sales cycles and improves the quality of opportunities in the pipeline.
- **Cost Savings:** Demonstrate how focusing on fewer, higher-value accounts reduces wasted spend on low-quality leads.

For example, leveraging tools like Demandbase or Gong can help you track and analyze ABM-specific metrics to present a clear and convincing narrative.

Spending Smart: What's Worth the Money?

Now, let's talk about where to put your budget. You've got limited resources, so make them count. These are the investments we recommend prioritizing for maximum impact:

1. **Intent Data:** This is non-negotiable. Intent data gives you insights into the accounts that are actively researching your products or solutions. With intent signals, you can prioritize the right accounts at the right time, giving you a huge edge over the competition.
2. **Personalized Content:** Custom content isn't cheap, but it's worth every penny. Your accounts want to feel understood. They want messaging that speaks directly to their challenges. Invest in case studies, white papers, videos, and landing pages that cater to the specific needs of your target accounts.
3. **Account-Specific Campaigns:** Mass emails and generic ads are out. Tailored, high-impact campaigns are in. Make sure your ad spend, email campaigns, and digital outreach are laser-focused on the accounts that matter.
4. **Sales Enablement Tools:** Sales teams need the right tools to close deals faster. Invest in solutions like revenue intelligence platforms (like Gong) that give your sales reps insights into what's working and what's not in their conversations. When sales has the right intel, they close deals.

Track ROI Like a Hawk

ABM is about results, not activity. So, if you're spending money, you better be tracking ROI.

Measure how your ABM spend is driving pipeline growth, accelerating deals, and increasing revenue from your target accounts. Look beyond surface-level metrics like clicks or impressions. Focus on outcomes—like deal size, win rates, and pipeline velocity.

Use data to make smarter decisions. If one channel or tactic is delivering huge ROI, double down. If another one is falling flat, pull back and reallocate the budget. Your ABM strategy needs to be dynamic, and your budget should reflect that flexibility.



Budget changes

Think hard about how ABM will impact each channel based on your objectives.

Sponsored Events	
Before ABM	Lots of events, small budget for each
After ABM	Fewer events, more budget
Guidance	Budget is reallocated to account-based events
Your Plan	
% Change	
Field Marketing	
Before ABM	Low-touch events across country
After ABM	Increased high-touch events in key territories
Guidance	Budget is re-allocated to account-based programs
Your Plan	
% Change	
Webinars	
Before ABM	Educational webinars focused on product and thought leadership
After ABM	No change
Guidance	No change to webinars, increased sales follow up
Your Plan	
% Change	

Advertising	
Before ABM	Untargeted advertising campaigns
After ABM	Focused advertising campaigns geared toward a set of accounts
Guidance	Budget decreases
Your Plan	
% Change	
Direct Mail	
Before ABM	Wide-reaching direct mail programs
After ABM	More high-value direct mail campaigns
Guidance	Budget increases
Your Plan	
% Change	
Content Creation	
Before ABM	Broad-scale content program
After ABM	Focused content creation for key segments
Guidance	Budget is reallocated to account-based content
Your Plan	
% Change	

Budget changes (cont.)

Think hard about how ABM will impact each channel based on your objectives.

Content Syndication	
Before ABM	Focus on lead volume, with low conversion rates
After ABM	High conversion rates from target accounts
Guidance	Budget decreases
Your Plan	
% Change	
Website	
Before ABM	One experience for all website visitors
After ABM	Unique, personalized experience for target accounts
Guidance	Budget increases
Your Plan	
% Change	

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Building and Aligning Your Revenue Team for ABM

Success doesn't come from a killer campaign or a great tech stack alone—it comes from sales, marketing, and operations working as one, laser-focused on the same accounts and the same outcomes. ABM isn't just a marketing strategy; it's a team sport.

But here's the thing: ABM doesn't just align teams; it demands alignment. It's not optional. When everyone knows their role, shares the same goals, and works together seamlessly, you unlock the full potential of account-based strategies.

If your revenue team isn't aligned, you'll feel it: dropped balls, miscommunication, wasted effort. The good news? When everyone's rowing in the same direction, the results are unstoppable. Let's talk about how to define roles, foster alignment, and build the kind of collaboration that turns ABM into a true growth engine.

Defining Roles and Responsibilities

Confusion kills ABM. If your team doesn't know who's responsible for what, nothing moves forward. That's why clarity is everything. Every player on the revenue team—sales, marketing, and operations—needs to know their role in the ABM process and how their work ties into the big picture.

Here's the breakdown

- **Marketing owns account engagement.** They create the campaigns, content, and experiences that attract and nurture your target accounts. Their job is to set the stage and drive interest.
- **Sales is the closer.** They focus on building relationships, identifying decision-makers, and advancing deals with target accounts. They're the ones on the front lines, turning engagement into revenue.
- **Operations makes it all run smoothly.** They own the data, tools, and systems that keep your ABM machine humming. From CRM integrations to campaign analytics, they ensure everyone has what they need to succeed.

One Team, One Goal

Alignment isn't about sitting in the same meetings or sharing a Slack channel. It's about working toward the same outcomes. Sales and marketing need to stop pointing fingers and start collaborating. ABM requires both teams to operate as one, united by the same target account list and KPIs.

The secret? Shared goals and shared wins. Sales and marketing need to agree on what success looks like—from initial engagement to closed deals—and hold each other accountable for delivering it. Regular check-ins are non-negotiable. Use these meetings to review progress, share insights, and solve roadblocks together.

And don't forget operations. They're the backbone of your ABM efforts, ensuring your tools, data, and workflows are built for alignment. Without them, everything falls apart.

While each function has distinct responsibilities, all teams must align around shared objectives, such as:

- Growing revenue from target accounts.
- Increasing engagement with key stakeholders.
- Accelerating pipeline velocity.

Use cross-functional planning sessions to align on these goals and define specific contributions from each team.

Own Your Role, Own the Results

Alignment isn't just about being on the same page—it's about owning your part of the process. Sales, marketing, and operations each need to be held accountable for their role in driving ABM

success. No finger-pointing. No “that's not my job.” Everyone contributes, and everyone owns the results.

For example, marketing is accountable for driving engagement within target accounts. Are the campaigns resonating? Are the right accounts moving forward?

Sales is responsible for advancing those accounts through the pipeline. Are they following up on engagement? Are they connecting with key decision-makers?

Operations ensures the data is accurate and actionable. Are the right accounts being surfaced? Are the insights clear and timely?

Accountability isn't about blame—it's about ownership. When everyone knows their role and delivers on it, the results speak for themselves.

There are a number of collaborative tools and processes that teams can use to cement alignment. Things like:

- **Shared dashboards:** Use unified dashboards to track account-level KPIs, ensuring all teams have access to the same data.
- **Regular check-ins:** Schedule weekly or bi-weekly meetings to review progress, share updates, and address roadblocks.
- **Defined handoff processes:** Clearly outline how leads, insights, or accounts are transitioned between marketing and sales.
- **Scorecards for Alignment:** Develop team scorecards that measure contributions across functions.
 - **Marketing:** Number of campaigns launched for target accounts.
 - **Sales:** Progression of target accounts through the pipeline.
 - **Operations:** Accuracy and completeness of account data.

Using Insights to Strengthen Collaboration

ABM generates a treasure trove of data—like sales call themes and engagement patterns—that can bring sales, marketing, and operations into tighter alignment when used effectively. Analyzing sales call recordings can reveal recurring objections or challenges across accounts, providing valuable insights for marketing to refine messaging and campaigns. Similarly, tracking stakeholder engagement patterns can highlight which content resonates most with key decision-makers, giving sales the information they need to tailor their outreach for maximum impact.

To ensure ongoing collaboration, monitor alignment metrics such as the percentage of target accounts receiving coordinated sales and marketing efforts, the frequency of cross-functional meetings, and stakeholder feedback on their experience. These insights don't just drive better campaigns—they build a stronger, more cohesive team focused on shared goals.

Call Themes and Shared Pain Points—Sales call recordings can uncover recurring challenges or objections across accounts. Share these insights with marketing to refine messaging and campaigns.

Stakeholder Engagement Patterns—Track how target accounts engage across touchpoints. For example, if certain stakeholders consistently interact with specific content, sales can use that knowledge to tailor outreach.

Alignment Metrics—Measure collaboration with metrics like:

- Percentage of target accounts receiving coordinated sales and marketing efforts.

- Frequency of cross-functional meetings or alignment sessions.
- Stakeholder feedback on the cohesion of their experience with your brand

Maintaining Alignment Over Time

Markets shift. Goals evolve. Teams change. For your ABM strategy to succeed, you need systems to keep alignment alive.

Keeping alignment alive is key to ABM success, especially as markets change, goals shift, and teams evolve. It's not a one-and-done deal—you need regular systems in place to stay on track. That's where alignment sessions come in. These aren't just status updates; they're chances to recalibrate. Use them to revisit your target account list, review what's working (and what's not), and tweak your tactics as needed. Make sure sales, marketing, and operations stay in sync, with tools and workflows that keep everything running smoothly. And don't forget to celebrate the wins! Recognizing team efforts builds trust and keeps the collaboration strong.

Here's how to keep things aligned:

- Revisit target account lists to stay focused on the right opportunities.
- Review campaign performance and pinpoint areas to improve.
- Adjust roles, workflows, or responsibilities as teams or goals shift.
- Celebrate milestones and successes to keep the momentum going.
- Encourage open feedback to uncover challenges and fresh ideas.
- Invest in ongoing training to keep teams sharp and strategies fresh.

Identify your team

Using the table, identify the names and roles of Marketing, Sales, and Operations leadership to put together your working team. Identify their top pain points or priorities to see where ABM can unite the team.

Marketing Leadership	Role and Priorities
Sales Leadership	Role and Priorities
Operations Leadership	Role and Priorities

Advanced considerations

Evaluate mechanisms for ensuring alignment.

What meetings have you established to discuss ABM strategies and effectiveness? Examples are a funnel working group

List the cadence for check-ins and dashboard distribution

List the ways you share information transparently, the information you send and receive, what information you wished you had, and what teams are not engaged that should be.

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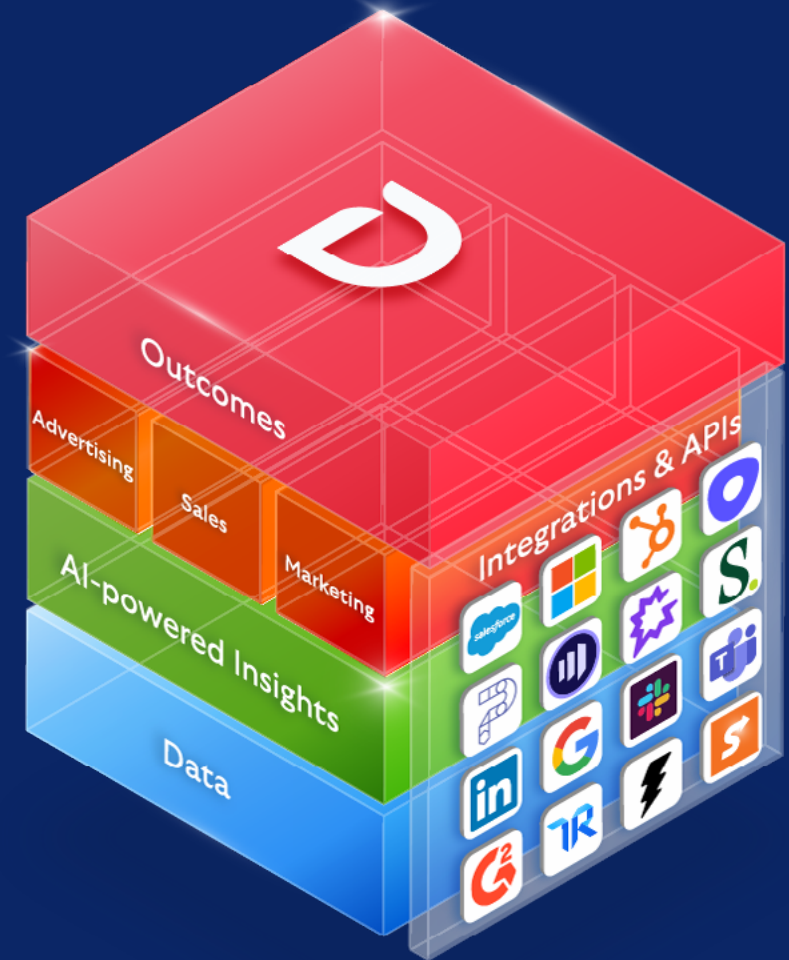
Optimizing Your ABM Tech Stack

Despite what you might hear from some tech vendors, you can't buy your way into an ABM strategy. And with thousands of technologies out there, it's easy to get overwhelmed or buy something you can't use or doesn't work as desired. Technology decisions must be driven by your strategy and deployed to fix specific issues. It's important that you determine the right use cases, needed resources, and success metrics before you sign on the dotted line. Those defined objectives and use cases will help you quickly see the value and demonstrate ROI making future investments a much easier sell.

To determine where to plug in technology, it's best to break the options down into categories and prioritize which areas are proving to be the most cumbersome or provide the biggest opportunity for success.

Infrastructure

This is one area most marketers have covered and includes your CRM, marketing automation system, and content management system. While the basics are working well, they may still be driving contact-level data and may need to be tuned with additional technology such as lead matching to help you act first on accounts and then on contacts.



Account selection

Account selection tools are those that enable you to identify and rank best fit target accounts at scale. Leveraging a tool that has artificial intelligence to identify your best fit accounts and prioritize them based on intent can expand your addressable market of accounts far beyond just those who look like your current customers. Additionally, technology can save you valuable resources when it comes time to update and optimize your list.

Engagement

Engagement tools enable you to connect with your target accounts and include social media, advertising, content, and events. The key is finding the technologies which will allow you to control your audience to your target account list, personalize the experience, and find out where your audiences are in their journey. Sales enablement Without a sales enablement solution, more and more of your leads—even those from your target account lists—will go untouched. That's because the sales reps don't have the insights they need in order to reach out to the lead. Invest in tools that offer your sales team contact development and enrichment as well as actionable insights to help them identify, reach, and tailor their outreach to the buying committee.

Measurement

Measurement is at the heart of ABM. If you can't tie marketing efforts to business results or pivot from lead, session, and click metrics to account-metrics, you'll need to invest in measurement technology. These will help you see which of your target accounts

are coming to your website, conduct account-based optimization tests, or get visibility into marketing program attribution

Find the Gaps, Prioritize the Fixes

Before you start adding new tools, take a hard look at your current stack. Are there tools you're paying for but barely using? Are there gaps keeping your team from executing critical ABM activities? For example, if your sales team struggles to prioritize accounts, you might need better intent data or predictive analytics. If marketing can't scale personalization, it's time to look at dynamic content tools.

Prioritize fixes based on what will make the biggest impact—fast. Focus first on tools that solve immediate pain points, then build toward more advanced capabilities.

- For instance, an intent data platform like Demandbase can help identify early signals from target accounts.
- A conversation intelligence tool like Gong can surface insights from sales calls, helping you better understand stakeholder sentiment. These aren't "nice-to-haves"—they're the tools that empower your team to work smarter and faster.

Build a Roadmap, Not a Shopping List

Your ABM tech stack isn't built overnight. The best results come from a phased approach that aligns with your business goals and team maturity. Start with the essentials—tools that solve immediate pain points and address foundational needs. Then, expand as your ABM strategy evolves.

Step one: audit your stack. What tools do you already have? Are they delivering value? What's missing?

Step two: prioritize investments. Start with the tools that will drive immediate ROI—like an intent platform to target accounts showing active buying signals.

Step three: integrate, integrate, integrate. The value of any tool multiplies when it works seamlessly with the rest of your stack.

And don't forget: this isn't a one-time exercise. Technology evolves, and so will your needs. Make regular stack reviews a habit, so your team is always equipped to win.

Your Tech Stack as a Competitive Advantage

When your tech stack is firing on all cylinders, it's more than a collection of tools—it's a competitive weapon. Sales, marketing, and operations can work together like never before, sharing data, insights, and workflows to engage the accounts that matter most. No missed signals. No duplicate work. Just a unified effort to turn high-value accounts into high-impact wins.

Your tech stack is about building a system that drives real, measurable results. So, don't settle for "good enough." Aim for a tech stack that's seamless, powerful, and perfectly aligned with your ABM strategy.

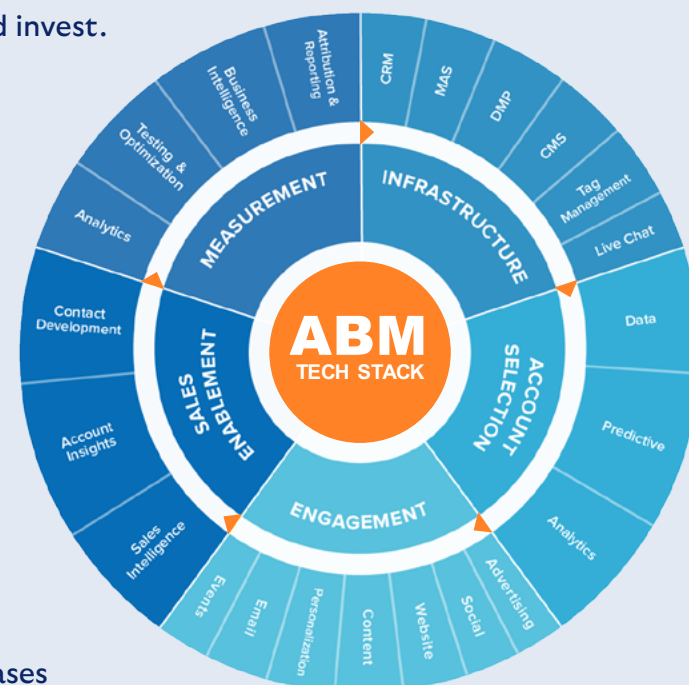
By continuously evaluating your stack and investing in tools that align with your strategy, you'll create a tech ecosystem that empowers your team to execute with precision and confidence.



Technologies in place

Using the technology wheel, identify which technologies you have, which you want, and the severity of the pain you're experiencing. This will help you determine where you should invest.

Technology	Have	Want	Pain index		
Infrastructure			<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low
Account Selection			<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low
Engagement			<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low
Sales Enablement			<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low
Measurement			<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low



Use cases

For the technologies identified above with a high pain index, document a set of use cases and success metrics which will help you quickly determine the ROI for your purchase.

Technology:				
Use Case 1:				
Use Case 2:				
Use Case 3:				
Success Metrics:				



CONCLUSION

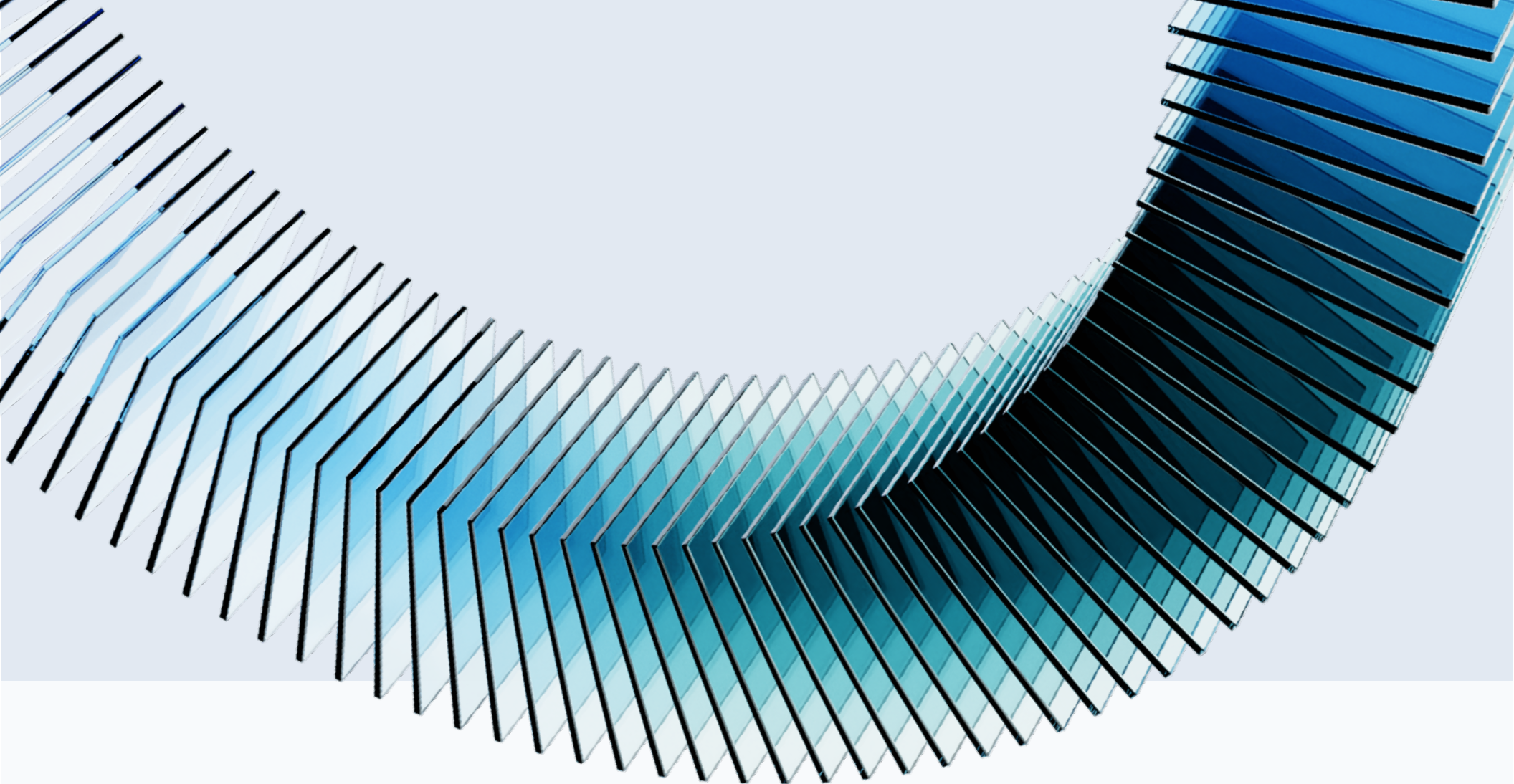
Own the Execution

Activating your ABM strategy across channels isn't about being everywhere—it's about being everywhere that matters. Advertising should grab attention with laser-focused precision. Your website should feel like a personal concierge for your top accounts. Events should forge connections that lead to revenue. And everything you do should feed into a loop of continuous improvement.

This is where ABM separates the good from the great. It's not about checking boxes. It's about showing up for your accounts with purpose, relevance, and confidence—and watching the results follow.

You're ready. Activate your channels, track your progress, and let your strategy shine.

Let's move the needle.



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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