



How to Prioritize Your Territory

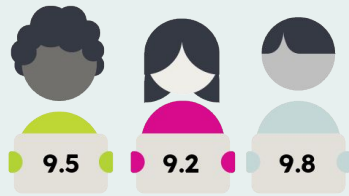
Nicole Drummond, Sales Development Manager,
Demandbase

Ross Sanbrook, Enterprise SDR, Demandbase

What We'll Cover

- How to Prioritize Accounts
- Leveraging Journey Stages
- Account Engagement
- Salesforce Integration
- Outreach Integration
- Custom Dashboards

How Demandbase Prioritizes Accounts



QUALIFICATION SCORE

The likelihood of ever becoming a customer



PIPELINE PREDICT

Highest propensity to become an opportunity in the next 30 days

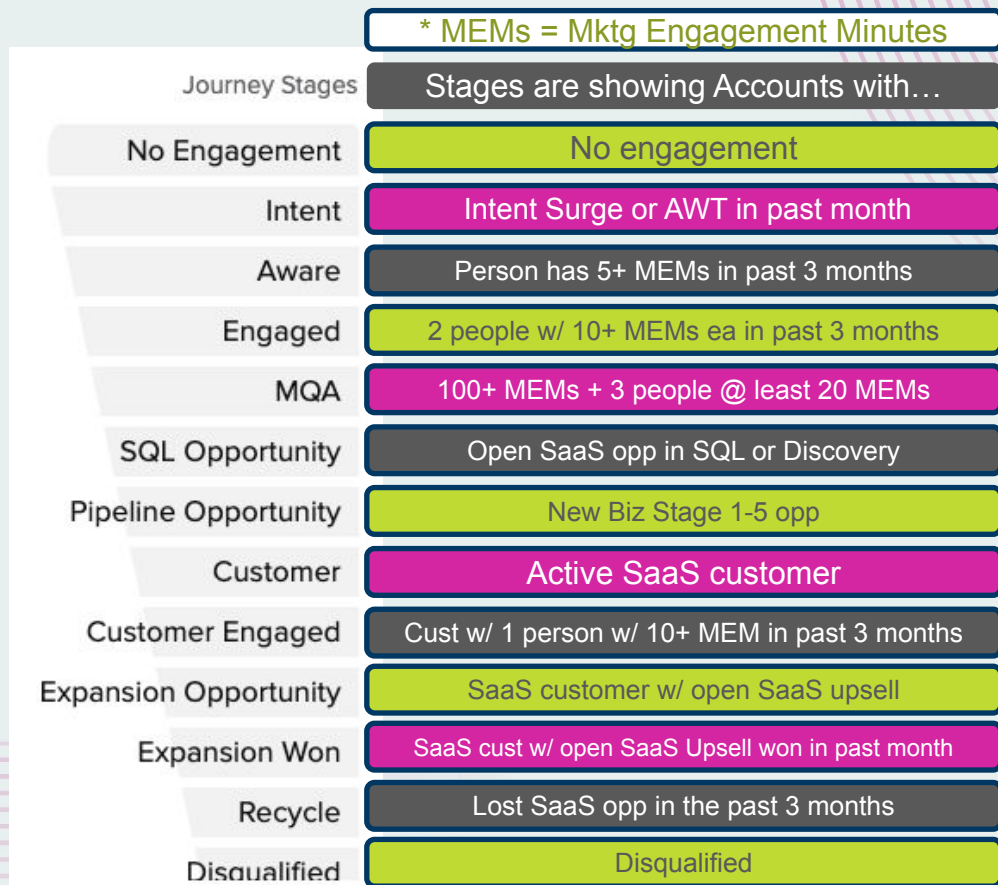


ENGAGEMENT MINUTES

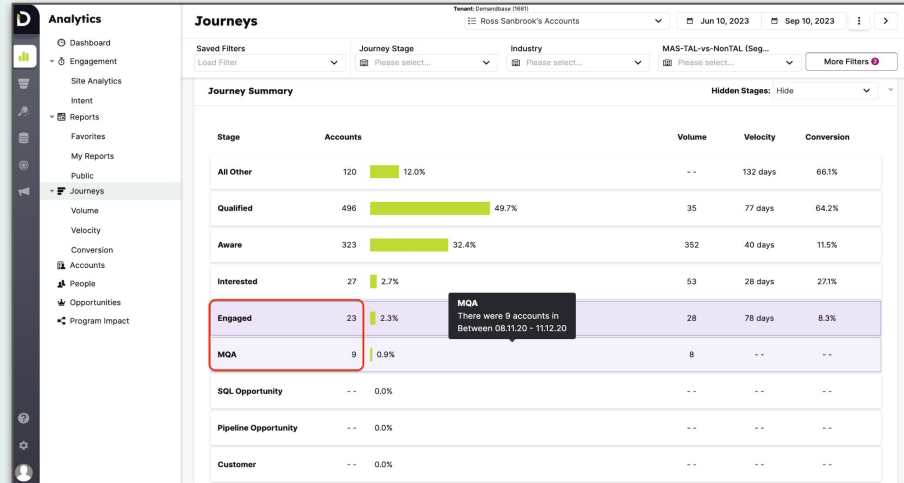
Assign a point system for specific levels of engagement

Journey Stages

- Where are your top accounts in their buyer's journey?
- Building block of your territory and prioritization
- Full customization to match your sales cycle



Journey Stages



Tenant: Demodbase (1581) | Ross Sanbrook's Accounts | Jun 10, 2023 | Sep 10, 2023

Industry: MAS-TAL-vs-NonTAL (Seg...)

All Accounts

32 Accounts

Account Name (32)	CRM Own...	SDR Owner	Account Tier	Top Pipeline...	Days in Journey ...	Top Qualification...	Website
Greg Ruisi	Ross Sanbrook	Tier 4 (ICP)	99.0%	82	85.0%	http://pl.com	
Greg Ruisi	Ross Sanbrook	Tier 2 (AE Top)	99.0%	290	75.0%	https://www.	
Greg Ruisi	Ross Sanbrook	Tier 4 (ICP)	99.0%	82	80.0%	https://www.	
Greg Ruisi	Ross Sanbrook	Tier 4 (ICP)	90.0%	13	90.0%	https://www.	
Greg Ruisi	Ross Sanbrook	Tier 5 (TAM)	84.0%	1	32.0%	https://www.	
Greg Ruisi	Ross Sanbrook	Tier 3 (DBTAL)	80.0%	79	64.0%	www.tdcana	
Greg Ruisi	Ross Sanbrook	Tier 4 (ICP)	73.0%	89	92.0%	http://www.n	
Greg Ruisi	Ross Sanbrook	Tier 4 (ICP)	72.0%	63	63.0%	https://www.	
Greg Ruisi	Ross Sanbrook	Not a Target	66.0%	13	90.0%	https://www.	
Greg Ruisi	Ross Sanbrook	Tier 5 (TAM)	59.0%	0	71.0%	https://www.	
Greg Ruisi	Ross Sanbrook	Tier 3 (DBTAL)	55.0%	83	55.0%	https://www.	
Greg Ruisi	Ross Sanbrook	Not a Target	53.0%	83	54.0%	https://www.	
Greg Ruisi	Ross Sanbrook	Tier 2 (AE Top)	53.0%	99	75.0%	scotiabank.c	
Greg Ruisi	Ross Sanbrook	Not a Target	50.0%	188	85.0%	https://www.	
Greg Ruisi	Ross Sanbrook	Tier 4 (ICP)	46.0%	27	89.0%	https://plans-	
Greg Ruisi	Ross Sanbrook	Tier 4 (ICP)	42.0%	220	87.0%	https://www.	
Greg Ruisi	Ross Sanbrook	Tier 5 (TAM)	40.0%	7	74.0%	https://www.	

Account Engagement

Analytics | Tenant: Demandbase (1681) | Jun 11, 2023 | Sep 11, 2023

MAD-ENT-Hunter

Saved Filters: Load Filter | More Filters

Quick Cards:

- Trending or High Intent - Last 30 Days
- Unique Web Visits - Last 30 Days
- Newly Engaged People - Last 30 Days
- Most Engaged People with Marketing Activities - Last 30 Days

Highlights:

- Attended OnDemand 2023-Q3-WBN-OD-Align-Sa... Visited 8 web pages
- Attended OnDemand 2023-Q3-WBN-OD-Align-Sa... Visited 5 web pages
- Attended OnDemand 2023-Q3-WBN-OD-Align-Sa... Visited 6 web pages

Analytics | Tenant: Demandbase (1681) | Jun 11, 2023 | Sep 11, 2023

Engagement

Saved Filters: Load Filter | More Filters

Engagement Minute Trend | Captured engagement - website page visits, trending intent keywords, known engagement.

Deal Story | Engagement | Group

Top engagement minutes - Aug 22 - Aug 28

Top Activities:

- Visit Web Page
- Trending Intent marketing automation
- Trending Intent display advertising

Top People:

- Person 1
- Person 2

Heatmap

Analytics | Tenant: Demandbase (1681) | Jun 11, 2023 | Sep 11, 2023

Engagement

Saved Filters: Load Filter | More Filters

Heatmap

Rows: Name | Columns: MAS-Persona (Segment) | Max Rows: 10

	Sales - Executive	Marketing - Other	Anonymous People	General Executives	Marketing - Executive	Sales - Other	Marketing - Digital and Web	Other	Marketing - Operations	Business - Operations
Totals	310	185	168	97	80	64	19	29	12	10
Stifel Financial Corp.	310	185	168	97	80	64	19	29	12	10

High (Green) to Low (Light Green)

Salesforce - Account

▼ Demandbase Sales Intelligence Cloud

Account | People | Engagement | Insights

Technographics

14 Technologies

- All
- CRM & Related (14)
- Office (17)
- Software Defined (1)
- ERP (8)
- E-Commerce (3)
- Business Services (3)
- Switches (1)
- HR (5)
- Marketing Services (5)
- Security (14)
- Servers (2)
- IT Infrastructure (40)
- Vertical Industry Soft... (9)
- Staffing Services (1)
- Digital Advertising (9)

CRM & Related

CRM Tools	Salesforce SPF
Web Technology	Jquery Validate
Customer Service Software	Cisco Unified Contact Center Express
	Fullstory
Marketing Software	Google Analytics
	Google Marketing Platform
	Google Tag Manager
	Marketo

▼ Demandbase Sales Intelligence Cloud

Account | People | Engagement | Insights

Family Tree

104 Accounts

Select All

Account Location

Employee Count

Revenue

Industry

Site data available

- St Louis, MO, United States (400)
- Baltimore, MD, United States
- Baltimore, MD, United States (9)
- New York, NY, United States
- San Francisco, CA, United States

Salesforce - People

▼ Demandbase Sales Intelligence Cloud

Account ▼ People Engagement ▼ Insights ▼

People

750 People [Reset](#)

750 Current 207 Former

Family Tree




- (750)
- (14)
- ... (10)
- (5)
- ... (1)

[+ Add Family Tree Nodes](#)

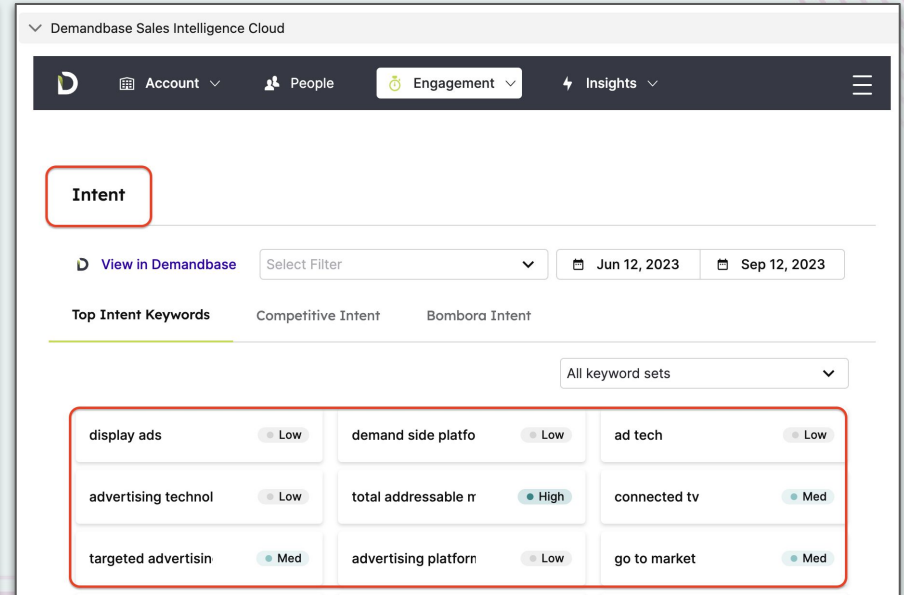
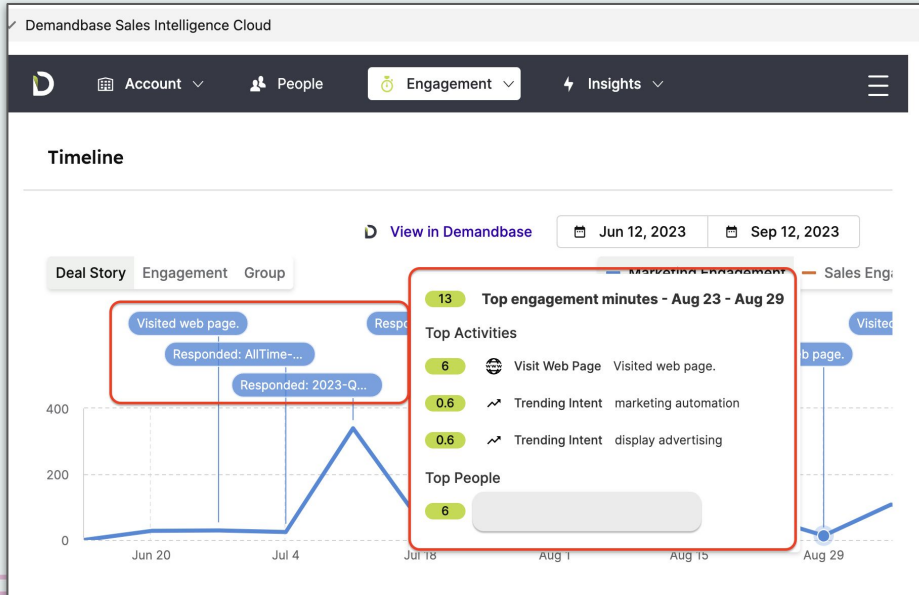
Job Function

- All
- Investment Manage... (2,597)
- Accounting and Finance (908)
- Sales (750)
- Operations (448)

Contacts (750) [Contact Information](#)

<input type="checkbox"/>		Managing Director/Investments, Sal... New York City, NY	in ✉ ☎ 📱
<input type="checkbox"/>		Managing Director Institutional Equi... Minneapolis, MN	in ✉ ☎ 📱
<input type="checkbox"/>		Managing Director, Institutional Sal... Cleveland, OH	in ✉ ☎

Salesforce - Engagement



Salesforce - Insights

▼ Demandbase Sales Intelligence Cloud

Account ▼ People Engagement ▼ Insights ▼


Search

125 News in the last 90 days

- All
- ▼ Team Agents ●
 - Grow sales tea... (1)
- ▼ Standard Agents ●
 - Bankruptcy & ... (1)
 - Company Pres... (52)
 - Compliance (24)
 - Cost Cutting (1)
 - Expanding Op... (1)
 - Funding Devel... (8)
 - Leadership Ch... (4)
 - Litigation (1)
 - New Offerings (1)
 - Outperforming (31)
 - Partnerships (1)
 - Real Estate: C... (1)
 - Research & De... (1)


ETF Daily News | Sep 8, 2023, 1:38:48 PM PDT

Compliance



ETF Daily News | Sep 8, 2023, 12:34:33 PM PDT

Outperforming



Outreach

The screenshot displays the Demandbase interface for an account. At the top, there is a navigation bar with tabs for Overview, Prospects, Sequences, Tasks, Opportunities, Emails, Calls, Meetings, Activity, and Demandbase. Below this is a dark header with icons for Account, People, Engagement, and Insights. The main content area shows the account name, a CRM status, and various metrics. On the left, there are two score boxes: 'Qualification Score: Unlikely' and 'Pipeline Predict Score: Highly Likely'. On the right, there are details about the account's value (\$100 M), employee count (1,600), location (New York, NY), and industry (Securities Brokers and Traders). A 'Show more' button is located at the bottom right of the main content area.

Accounts / [Redacted]

Overview Prospects Sequences Tasks Opportunities Emails Calls Meetings Activity Demandbase

D Account People Engagement Insights

[Redacted] 998 [LinkedIn] [Twitter]

Private | [Redacted]

CRM

1 Page Views • 88% ↓ SQL Opportunity

Qualification Score: Unlikely
All Data B...

Pipeline Predict Score: Highly Likely
Produc...

\$100 M 1,600 [Redacted]

New York, NY

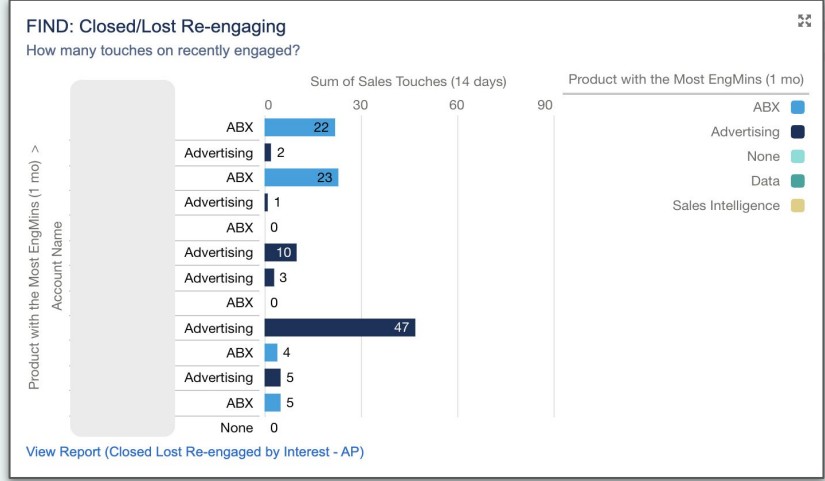
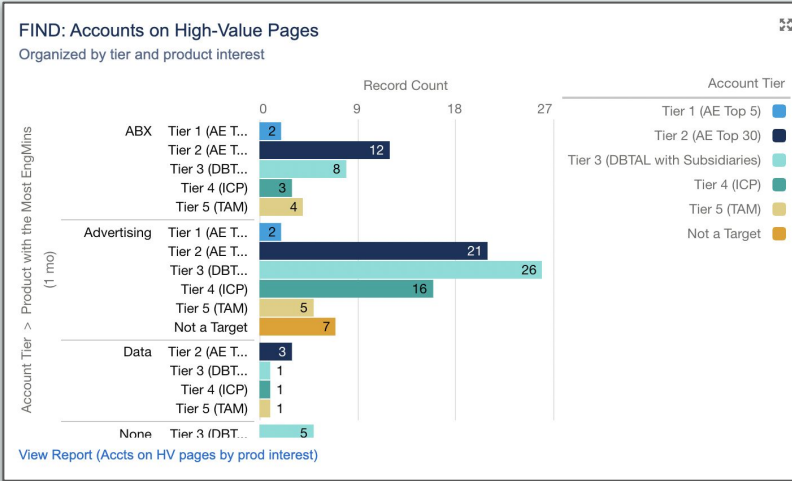
Securities Brokers and Traders

[Redacted]

3

Show more

Sales Leader Dashboard - Find



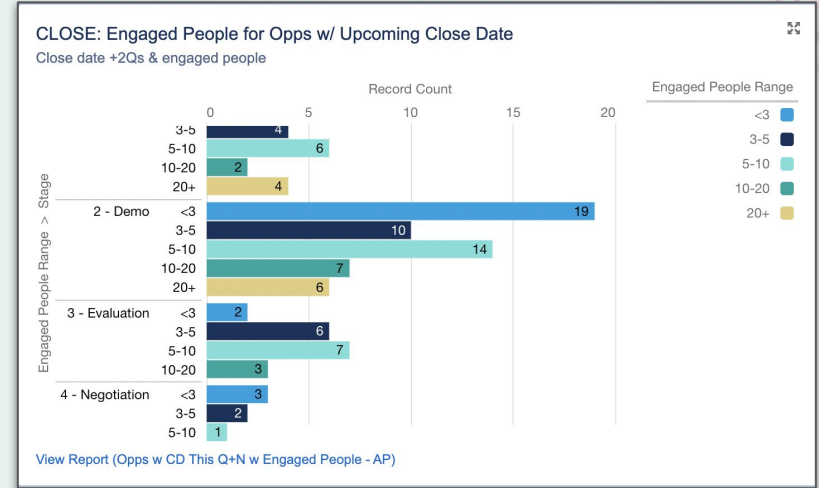
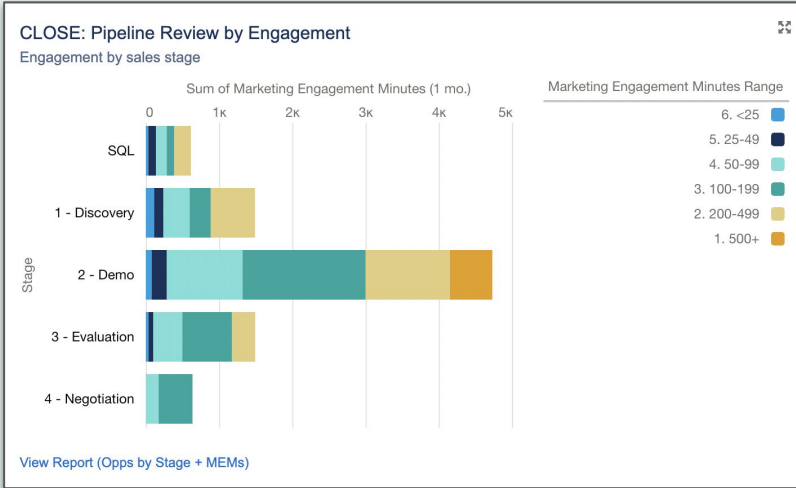
FIND: Renewal Dates with Competitors

Utilize renewal date + interest & intent

Account Name	Renewal Date - ...	Product with the Most EngMins...	Marketing Engagement Minutes (1 ...)	High Value Page Visits (3 mo.)	Intent 3mo - ABX Cloud	Intent 3mo - Competitive - ABX...
[Account Name]	10/2/2023	ABX	132	demandbase.com/product-tour/abx, demandbase.com/products/account-intelligence, demandbase.com/blog/2022-forrester-abm-tel-study	-	-
	10/2/2023	None	132	demandbase.com/products/advertising, demandbase.com/problems-we-solve/engage, demandbase.com/products/account-intelligence/company-information	predictive analytics, go to market	-
	10/2/2023	Sales Intelligence	132	demandbase.com/products/account-intelligence, demandbase.com/pricing, demandbase.com/products/advertising	go to market, predictive analytics, go to market strategies	bombora
	10/2/2023	ABX	115	demandbase.com/products/advertising, demandbase.com/book-meeting, demandbase.com/why-demandbase/fsense	predictive analytics	-

[View Report \(Competitor Renewal Date + Prod Interest\)](#)

Sales Leader Dashboard - Close



CLOSE: Opps w/ Competitive Intent

Be ready to fight off threats

Account Name	Qualificati...	Enga...	Marketing Engagement Minu...	Marketing Engagement Minu...	Intent 3mo - Competitive ...	Intent 3mo - Competitive...	Intent 3mo - Competitive - SI C...	Intent 3mo - Competitive - Data Cloud
	98	27	482	2k	bombora, 6sense, true influence	terminus, mediamath, techtarget	zoominfo, datafox, seamless ai	data management platform, datafox, clearbit
	98	22	186	442	bombora, lean data, true influence	terminus, mediamath, adroll	zoominfo, seamless ai, lusha	people data labs, data management platform, clearbit
	97	7	56	107	true influence, bombora	terminus, mediamath, techtarget	zoominfo	people data labs
	92	3	93	235	6sense, true influence	terminus, mediamath, techtarget	zoominfo, lusha, dun and bradstreet	people data labs, clearbit
	92	23	156	560	dark funnel	terminus, techtarget	zoominfo, seamless ai, bureau van dijk	data management platform, people data labs, clear bit
	92	2	64	207	bombora	terminus, mediamath, adroll	zoominfo, upload, slintel	data management platform
	92	23	308	613	lean data, 6sense	terminus, mediamath, techtarget	zoominfo, seamless ai	leadspace

View Report (Open Opps Showing Competitive Intent -AP)

Sales Leader Dashboard - Expand

EXPAND: Competitive Intent

Low engagement + competitive intent

Account Name	Account H...	La...	Engagement Minutes...	Intent 3mo - Competitive - A...
[Redacted]	55	7/25/	26	bombora
	60	9/17/	60	true influence
	43	7/27/	112	6sense
	60	9/11/	131	bombora
	60	8/9/2	168	true influence
	74	9/15/	218	bombora, evergage, true influence

[View Report \(ABX Cust w Competitive Intent - ENT GAD\)](#)

EXPAND: Upsell Alert - ABX

Account Name	Account Health ...	Intent 3mo - ABX Cloud	Intent 3mo - Competitive - AB...
[Redacted]	70	predictive analytics, go to market, go to market strategies	bombora, true influence
	70	go to market, predictive analytics, account based marketing	-
	68	go to market, predictive analytics, sales analytics	metadata io
	60	go to market, account insights	-

[View Report \(Non ABX Cust w ABX Intent - ENT GAD\)](#)

EXPAND: Customers on High-Value Pages

Viewing content related to new products?

Account Name	High Value Page Visits (1 mo.)	Engagement Minutes (1 mo.) ↓	Sales Touches (1 mo.)
[Redacted]	demandbase.com/products/personalization, demandbase.com/products/advertising, demandbase.com/resources/case-study/tricentis-expands-relationship-with-demandbase-and-grows-bdr-pipeline-31	3k	157
	demandbase.com/resources/case-study, demandbase.com/products/account-intelligence, demandbase.com/why-demandbase/6sense	1k	38
	demandbase.com/book-meeting, demandbase.com/resources/ebook/2022-gartner-abm-magic-quadrant-thank-you, demandbase.com/products/advertising/ctv	938	22

[View Report \(ENT GAD Resources \(All\) Last 30\)](#)

Thank you!