Demandbase

Best Practices: Account-Based Marketing

By Demandbase Champions
Class of 2023

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Forward

Demandbase Champions are the vanguard of Smarter Go-to-Market™ strategies, embodying the highest standards of excellence in ABM and ABX. Utilizing Demandbase One™ to its fullest, they set the pace in data-driven insights and targeted account engagement, thus driving undeniable ROI and elevating the entire B2B marketing, and sales ecosystem.

To our current Champions, your achievements are a source of immense pride for all of us at Demandbase. You're not just users; you're industry-shaping thought leaders who contribute actively to our community and set new benchmarks in ABM excellence. Congratulations, and thank you — you've more than earned this recognition.

Kelly Hopping, Chief Marketing Officer, Demandbase

Chapter 1

Proven Strategies and Time Saving Tips Using Demandbase One™ and Account-Based Marketing

by Dan Cafiero, Senior Program Manager, ABM, Martech and Paid Media, Seagate

Introduction

In this chapter, I share my insights, proven strategies, and time saving tips I've learned using Demandbase One, including advertising, sales intelligence, data and account-based experience. By immersing yourself in this chapter, your team will gain access to insider tips to optimize your marketing efforts, supercharge conversions, and drive revenue growth.

This information will help you revolutionize your account-based marketing initiatives while saving valuable time and resources.

Get to Know Dan Cafiero

Connect on LinkedIn

Using Demandbase Advertising

What is Demandbase Advertising and how does it help target specific accounts effectively?

Demandbase Advertising is a powerful platform that enables marketers to target specific accounts with precision. By leveraging account-based targeting, it helps marketers engage the right accounts at the right time with personalized messaging, driving higher conversion rates and ROI.

How can I optimize my display advertising campaigns using Demandbase Advertising?

With Demandbase Advertising, you can optimize display advertising campaigns by tailoring them to specific accounts. By leveraging account-based targeting, you can create personalized and relevant ads that resonate with your target accounts, resulting in higher engagement and conversion rates.

Can I measure the performance and ROI of my advertising efforts within Demandbase Advertising?

Yes, Demandbase Advertising provides robust analytics and reporting capabilities. It allows you to track the performance of your advertising campaigns, measure key metrics such as click-through rates and conversions, and calculate the ROI of your advertising efforts, providing valuable insights to optimize future campaigns.

Tips & Tricks

- Implement proper tagging on your website and landing pages for accurate campaign tracking.
- Leverage personalization options to customize messaging, content, and calls-to-action for targeted accounts.
- Regularly analyze campaign performance and metrics to identify areas for optimization.
- Conduct A/B testing to experiment with different variations of messaging and content.

Using Demandbase Sales Intelligence

What is Demandbase Sales Intelligence, and how can it enhance sales effectiveness?

Demandbase Sales Intelligence equips sales teams with valuable insights and data to enhance their effectiveness. It provides information on key decision makers within target accounts, their interests, and engagement levels, enabling sales professionals to tailor their messaging, prioritize leads, and close deals more effectively.

How can Demandbase Sales Intelligence help identify key decision makers within target accounts?

Demandbase Sales Intelligence leverages intent data and firmographic information to identify key decision-makers within target accounts. It provides detailed profiles that include contact information, job titles, and insights on their engagement with your brand, helping sales teams identify and connect with the right individuals within their target accounts.

What types of insights and data are available through Demandbase Sales Intelligence?

The Demandbase Sales Intelligence platform provides a wide range of insights and data, including firmographic details, intent signals, website engagement data, and technographic information, plus contact details, social profiles, news alerts, and connections. These insights empower sales teams to have more meaningful conversations, understand account needs, and tailor their approach to effectively engage and convert target accounts.

Tips & Tricks

- Utilize intent data, news and social alerts to effectively inform your content strategy and tailor messaging.
- Collaborate with the Demandbase community to gain insights and best practices.
- Integrate Sales Intelligence with your existing systems for streamlined workflows and data sharing.
- Share success stories and ROI to generate enthusiasm and support for adoption.

Using Demandbase Data

What is Demandbase Data and how can it enhance marketing personalization efforts?

Demandbase Data is a comprehensive data solution that helps marketers enhance their personalization efforts. It provides a wealth of actionable data, including firmographic information, intent signals, and account-level insights. Leveraging this data, marketers can deliver personalized and targeted campaigns that resonate with their audience, driving higher engagement and conversion rates.

How can I leverage Demandbase Data to enrich my existing customer data?

By integrating Demandbase Data with your existing customer data, you can enrich the understanding of your customers. It provides additional insights such as intent data and firmographic details, which will enable you to create more accurate customer profiles, personalize your marketing efforts, and to deliver relevant experiences to your customers.

Can Demandbase Data integrate with other marketing platforms and tools?

Yes, Demandbase Data offers integrations with various marketing platforms and tools, including customer relationship management (CRM) systems, marketing automation platforms, and analytics tools. This allows you to seamlessly incorporate Demandbase's data into your existing marketing ecosystem, enabling you to leverage the insights and enhance your marketing efforts across multiple channels.

Tips & Tricks

- Leverage the valuable intent data provided by Demandbase Data to inform content strategy and engagement prioritization.
- Integrate Demandbase Data with your existing marketing technology stack for enhanced efficiency.
- Regularly analyze and optimize campaigns based on Demandbase's analytics tools.
- Stay updated with product releases and updates to explore new features and enhancements.

Using Demandbase Account-Based Experience

What is Demandbase ABX and how does it align marketing and sales efforts?

Demandbase ABX (account-based experience) is designed to align marketing and sales efforts in delivering personalized and seamless account-based experiences. It enables marketing and sales teams to collaborate closely, share account insights, and coordinate their strategies to engage target accounts at every stage of the buyer's journey.

How can Demandbase ABX help in creating seamless account-based experiences across channels?

Demandbase ABX allows you to create cohesive and personalized experiences across various channels, including email, website, advertising, and sales interactions. By leveraging account-based data and insights, you can tailor messaging and content to specific accounts, ensuring consistent and relevant experiences that resonate with your target audience, regardless of the channel they engage with.

What features does ABX offer to enhance account-based marketing strategies?

ABX offers a range of features to enhance your account-based marketing (ABM) strategies. These include account-based advertising, website personalization, intent monitoring, lead scoring, and account-based analytics. These features enable you to identify and target key accounts, personalize experiences, prioritize leads, track engagement, and measure the impact of your ABM initiatives, allowing for continuous optimization and success.

Tips & Tricks

- Leverage the valuable intent data provided by Demandbase Data to inform content strategy and engagement prioritization.
- Integrate Demandbase Data with your existing marketing technology stack for enhanced efficiency.
- Regularly analyze and optimize campaigns based on Demandbase's analytics tools.
- Stay updated with product releases and updates to explore new features and enhancements.

Chapter 2

Learn How to Build a Framework for Multi-Product Engagement Reporting

by Kris Catterall, Director, Marketing Operations, Healthedge

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Introduction

As organizations continue to grow and mature, they will often expand their product offering. As this happens, those who use Demandbase to monitor the engagement of customers and prospects will need to expand their use of the tool.

Creating the framework to report on engagement across multiple product streams will require the mastery of several Demandbase features:

- Segments
- Activity Filters
- View Management

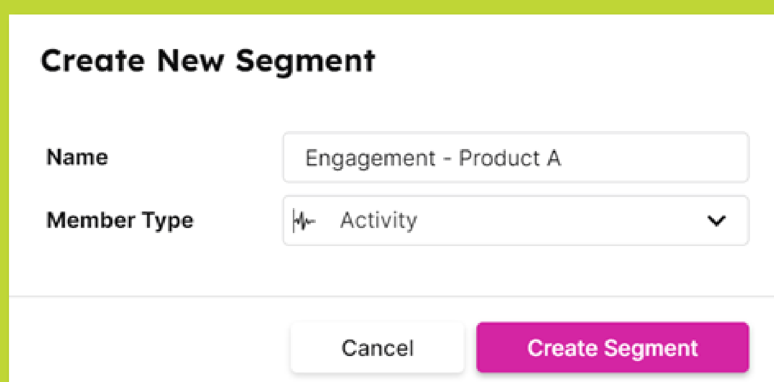
Following these steps will create the foundation from which you can have the most important data flowing to the right sales representatives in real time.

The power of segments

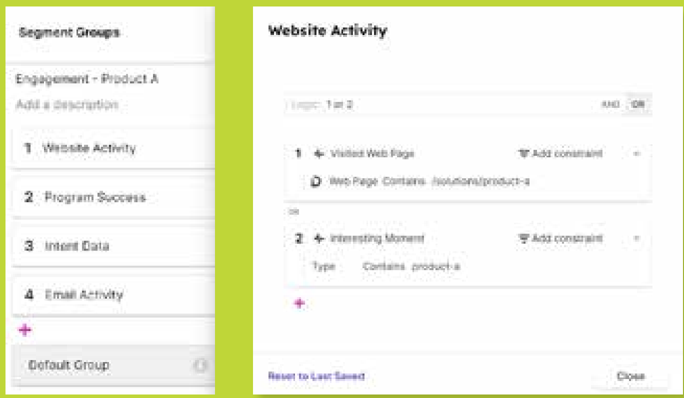
Demandbase segments are an invaluable tool for several reasons but are critical for this initiative. The best place to start would be documenting each of the products and digital channels you wish to track:

Products	Channels
Product A	Website Activity
Product B	Program Success
Product C	Intent Data
Product D	Email Activity

Begin by creating a new activity segment for your first product, we'll call it "Product A". At this point you will be prompted to create the groups for your new segment. This is where your product and channel mapping from earlier will come in handy. Grouping the activity by channel is not required but will make analyzing and modifying the segments easier down the road, these are merely suggestions, which channels you use is up to you.



How you define the rules in the segment groupings is critical to long term success. How simple or complex your rules will be is dependent on other aspects of your website and martech stack. Having a clearly defined naming structure across your digital assets will make the setup and maintenance much easier.

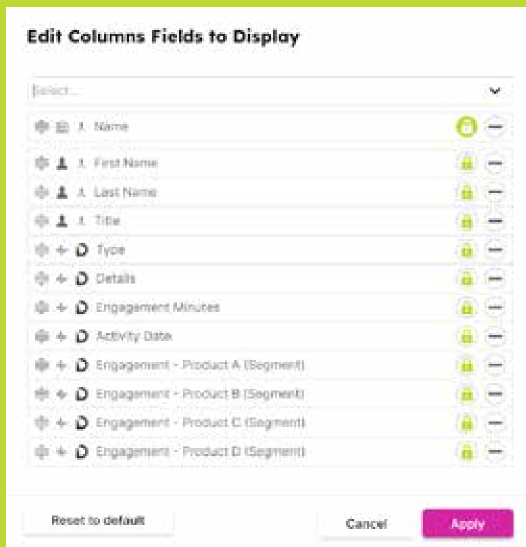


Once you have completed the rule building for each of the channel groups for Product A engagement segment, repeat the same process for the other products. ***Note: any activities that do not meet the criteria defined in your channel grouping rules will fall into the Default Group bucket.***

Before we move on to the next step, it’s time to put those new segments to the test. Navigate over the Engagement tab in Analytics and update the columns in your Activities table with your newly created activity segment fields.

Next, you will want to export a working sample of data to test that your segment rules are working as intended and product specific activities are falling into the appropriate buckets. If not, identify the issues and refine your rules until the results are satisfactory.

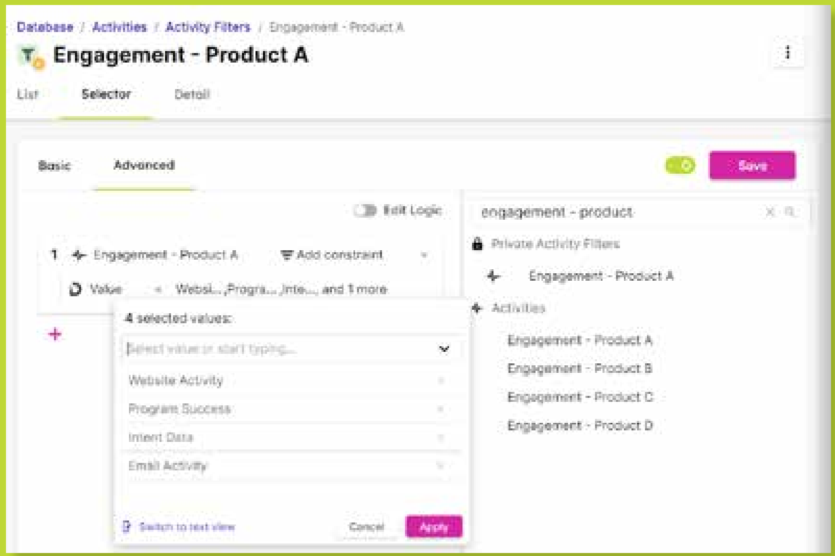
Setting up the segments is akin to laying the foundation of a house on which everything is built. Now that you have poured the concrete and let it set, it’s time to begin framing out that house!



Building activity filters

Now that we have our new activity segments fully vetted and tested, it's time to put our work into action. The next stop on our journey is to build activity filters to compliment each of our segments. These activity filters will become extremely valuable as you roll this out to your teams via view management and reporting.

Create an activity filter for each of the activity segments you created in the first step, and be sure to include your desired channels - but **do not include** the default group. Remember, the default group is the catch all bucket for activities that do not meet the criteria you defined in your channel rules - this means that activities that relate to other products will fall into this bucket.



If you have a sales team that covers specific territories, this would be a good opportunity to build those into your product specific engagement reporting. Instead of building one activity per product segment, you can expand the logic to include activity for Product A plus accounts in the east territory.

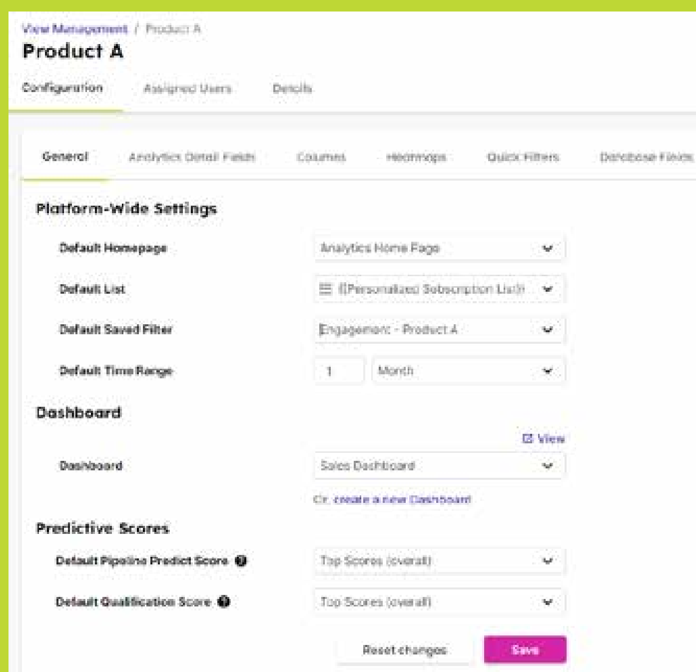
Rollout and user adoption

The time has come! We are ready to roll out our new product-specific activity segments to our end users.

Just as we have in each of the previous steps, the same goes for View Management. Create a new view to compliment the segments and filters you created in the previous steps.

Be sure to assign the correct filter in the “Default Saved Filter” option on the General tab. Once you have completed the other aspects of each new view, assign your users based off of the product or territory they cover.

This is where the magic happens! Now that your users have been assigned to the view, all of their dashboards and reports will be pre-filtered to only show activities that relate to the product that they cover.



Demandbase

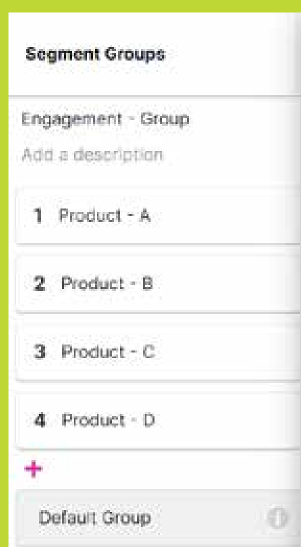
Reporting

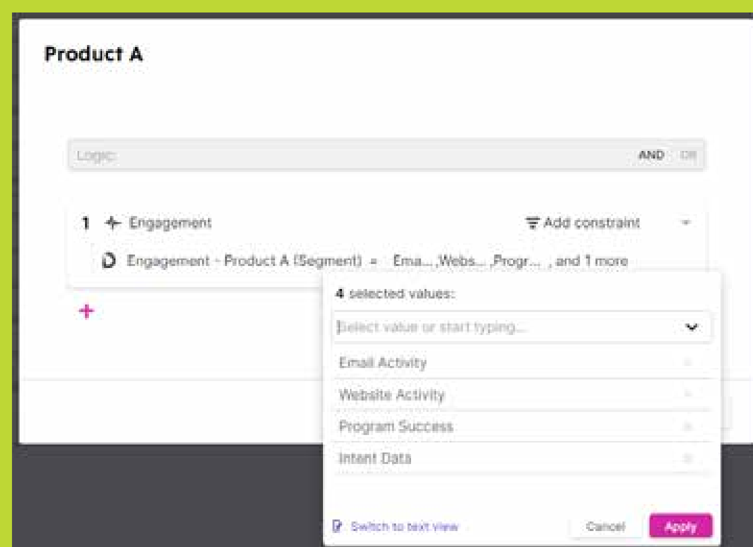
Whether you are in marketing operations, sales operations, or revenue operations, chances are you have internal stakeholders that will want a top level view of engagement by product. This information will help inform how campaigns are performing, or where more effort is needed.

In this case, you will want to go back and create one more segment to track activity at the macro level. This time, instead of creating your segment groupings as channels, build your segment groups out for each of your products. In the rule logic for each segment group you can now reference the product specific segments that you created earlier.

Again, be sure not to include the Default Group in your rule logic as that will let in undesirable, or unsegmented activities.

This new group activity segment can now be referenced in a multitude of ways to show how each product is performing. A few favorites include looking at the Engagement Minute Trend graph, grouped by your new segment group. Alternatively, use it on your Heatmap to spot which industries or job levels are engaging with which of your product offerings.





Continuous improvement

Now that you're done and the sales teams are off and running with their focused view's and reporting, marketing and sales leaders are satisfied with the macro reporting view, what's next?

Refine, refine, refine!

On a semi-regular basis, analyze your data and look for the following:

- Are your segment rules working as intended and activities are falling into the correct product buckets?
- Are there activities that are falling into your default group buckets that shouldn't be?

Resources:

Demandbase Champions Present: MOPs Expert Ask Me Anything (video)

Chapter 3

Storytelling with Demandbase

by Jim Foster, Commercial Account Executive, StreamSets

Get to Know Jim Foster

Connect on LinkedIn

"Disclaimer"

These are just my opinions, my experience, and this is my chapter of the eBook, so brace yourself... ***Tailored to sellers by a seller but (hopefully) to be enjoyed by all.***

Steve Jobs, Batman, And A Sales Guy?

Steve Jobs once shared in a lunchroom with some colleagues at his new company NeXT, "The most powerful person in the world is the storyteller". You often hear about how top sellers are great storytellers, but what makes a great story?

AI lets you know that, "A great story captivates its audience by weaving compelling characters, a meaningful plot, and emotional resonance into a cohesive narrative." As much as I would love to put myself in Batman's shoes and somehow twist the fearless crime-fighting, mysterious, caped vigilante's story into my own... I think we'd all find it quite difficult to bring it back into business value and outcomes.

What if there was a way to tell a great story while focusing on what matters? Let's take a step back from the badass hero stories and focus on what makes a sale happen, and what customers care about: their needs, building trust, and inspiring action.

A little context

As an SDR, I was fiercely driven from the start. I prospected tirelessly, making hundreds of daily cold calls, and sometimes being that overly persistent caller (apologies for that). Getting through to prospects was only half the challenge; the real battle was persuading them not only to stay on the line but also to schedule a meeting for a non-salesy platform discussion. Admittedly, the latter part was far more demanding. There were those moments, known to many, where I'd answer a call, get the jitters, and momentarily forget who I worked for. This "if you know, you know" phase started fading as I found a stronger sense of purpose in my calls.

StreamSets had just recently onboarded Demandbase, and I was initially puzzled about its purpose and benefits amidst a sea of acronyms (ABM, GTM, YOLO — still unsure about that one). I already had my own effective process, so adding another tool seemed unnecessary. However, everything changed when I attended a user group meeting and connected with Demandbase's remarkable community. This experience led me to fully embrace Demandbase, a pivotal element in my success story.

Fast forward a few months, I earned the title of "Account Executive", achieved the status of a Demandbase Champion, and, I may or may not be Batman. What stands out the most in retrospect is the shift to working smarter, not harder, and Demandbase played a crucial role in making that shift happen.

The power of data

The power of data in Demandbase is a ***game-changer for sellers***. It enables them to gain deep insights into their target accounts, understand their behaviors, and tailor their outreach with precision. By focusing on data-driven strategies, sellers can identify the most promising leads, personalize their messaging, and engage prospects at the right time with the right content. This will not only enhance your efficiency with your sales efforts but it will also build trust with potential customers, as they see that their needs and preferences are understood and valued. Data empowers sellers to create meaningful connections and drive better outcomes in the world of B2B sales.

> **My goal is to try and cut out the noise to other sellers so that I can guide you directly to what has brought me the most success when using Demandbase.**

Don’t stop believin’

Let’s talk about Journey(s). Your incredible marketing team has strategically grouped accounts together based on their activity, an easy way to find the lowest-hanging fruit.

My advice to you? Find your sweet spot, everyone’s going to be different. As an example, check these Demandbase Journey Stages out. Personally (when prospecting new accounts), I would immediately focus on MQA’s then work my way up.

You often hear people talking about “casting wide nets” and “spearfishing” in sales, why not both? Find ways to automate your “wide net” prospecting and outreach processes, and focus most of your time and attention on “spearfishing” your low-hanging fruits. Through the use of Demandbase, you’ve now found a quick and easy way to identify top accounts. Great, now let’s focus on how to tailor your message and really catch your target audience’s attention.

Journey Stages

A prospecting "cheat code"

What better way to engage with prospects and customers than to have an "inside look" at where their attention lies? Move beyond generic pitches and create compelling, personalized narratives that capture the attention of their target accounts by using the intent and engagement section of Demandbase.

Intent	Engagement
Information collected from online activities and behaviors of businesses and individuals, indicating their interest or intent in specific products, services, or topics.	Information collected from various interactions and activities that individuals or businesses have with a company's digital content, website, or marketing campaigns.

To summarize, intent will give you a quick look at trending keywords (competitors, use-cases, etc.), whereas engagement will show you account interactions (responding to emails/calls, clicking emails, etc.). This is a prospecting cheat-code, at a quick glance, you have visibility into account interests and can use that information to your advantage when crafting a custom message that will capture attention and resonate with your target audience.

I've been able to relate my messages to my target audience by specifically addressing what Demandbase has gathered for me under intent and engagement. Whether I'm looking into competitive intent, or maybe some key words they're searching, I try to put these clues together to identify who may be interested then send out tailored messages. That second half of the battle when cold calling gets a lot easier when you know the in's and out's of the field that you're fighting on.

Happy selling!

The beauty of Demandbase is that, when used correctly, it will be there in every step of the way during your sale. Through the use of journey stages, intent, and engagement, you have everything you need in order to target the right accounts, the right people, and say the right things.

You've got everything you need to tell a good story; a story that will resonate with your audience and ideally lead you to address their needs, build trust, and inspire action. What more could you ask for? Happy selling.

Are you tired of me yet?

If not, please feel free to reach out if you have any questions or comments! I'd be more than happy to assist in any way that I can.

Let's connect on LinkedIn!

Chapter 4

3Ws of Paid Media in ABM: Roles, Importance, Initiation, and Metrics

by Mariia Golub, Sr. Digital Marketing Specialist, Grid Dynamics

Get to Know Dr Mariia Golub

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Introduction

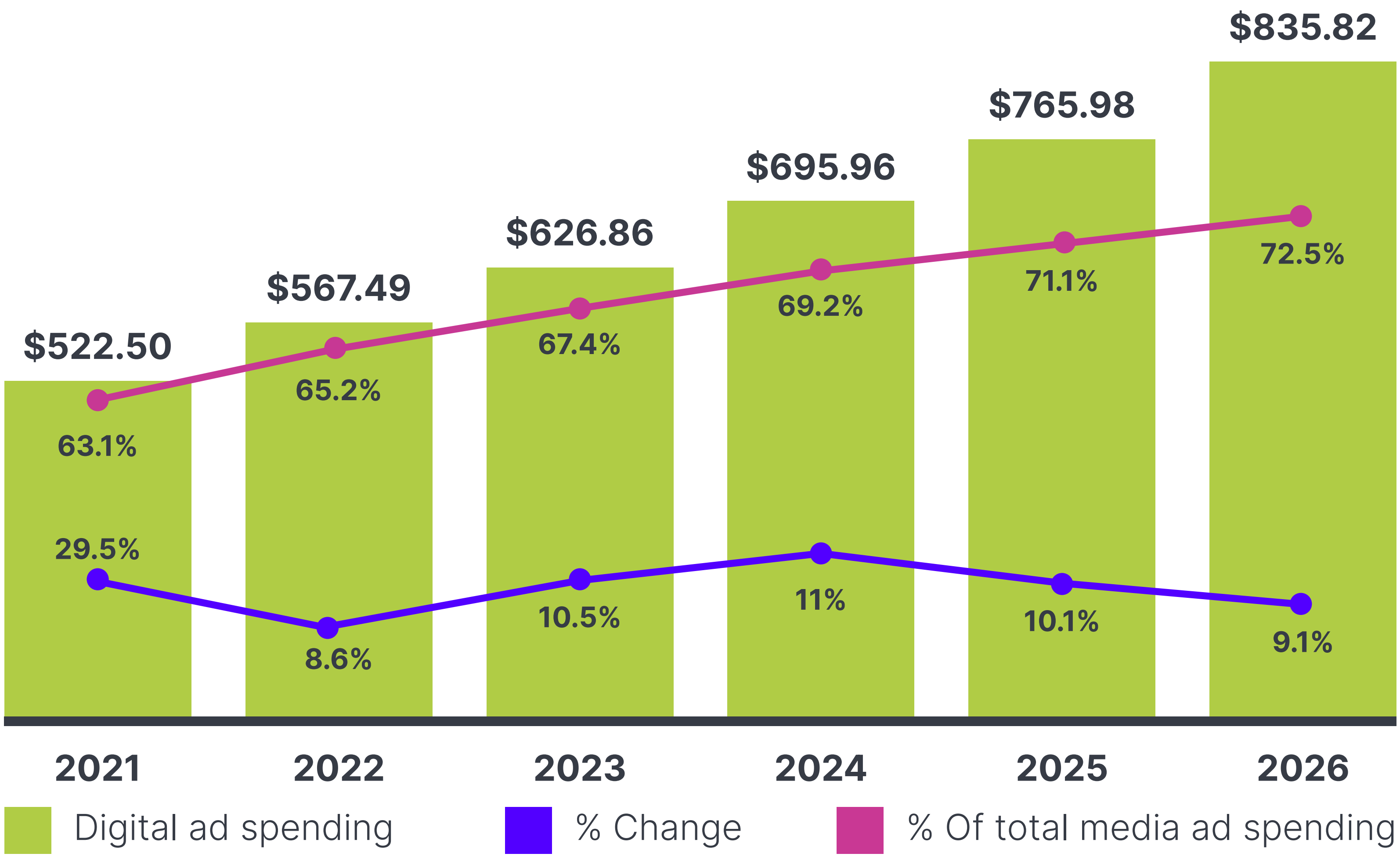
If you've been involved in creating, running, and analyzing ABM strategies, you're probably familiar with the significance of display ads. These banners, graphics, and text, set apart from the main content of the hosting website, typically form a segment of a broader digital display marketing initiative. Globally, digital ads are increasingly more competitive and help to increase awareness of your brand and warm-up target audience. eMarketer reports that digital ad spending growth has decelerated precipitously but will reach 10.5% year over year in 2023. ***(see graph on p23)***

As these figures rise, marketers agreed that the results of this are in enhancing the approach, originality, implementation, and comprehensive evaluation of digital ads to consistently boost campaign results and ensure a solid return on investment.

In addition, the answer to some of these challenges is account-based marketing. This approach allows for direct marketing to distinct businesses with tailored campaigns, increasing your appeal to them. Of course, in this vector using paid media could really increase performance and provide a consistent nurturing process.

Digital Ad Spending Worldwide, 2021-2026

Billions, %change, and % of total media ad spending



What is the role of paid media in an ABM strategy?

Paid media plays a crucial role in ABM strategy, starting with preparing a personalized strategy for identified accounts, continuing with reaching and engaging these target accounts. There are some advantages of using paid media: simplicity, personalization, scalability, and ability of multi-channel engagement.

The main importance of using paid media

Personalization
Allows businesses to create unique experiences for each target account. With the advantage of data-driven insights and specific account intents, ads can be customized to resonate with each account's distinct challenges, needs, or stage in their journey.

Multi-channel engagement
Synchronizes ABM strategy across different platforms to reach target accounts (so you are not limited to just websites). This cross-channel approach helps brands to be visible across various interaction points.

Additionally, paid media in ABM is beneficial in many ways if you want to:

- Increase awareness
- Create and/or drive intent
- Drive conversions
- Assist the sales team throughout extended B2B sales processes
- Boost client retention and stimulate upsells

Rather than being limited to a single social platform, ABM display advertising grants access to potential buyers across a vast array of websites. Plus, these ads can be seamlessly blended with other channels for remarketing with the help of orchestration. Yet, diving into ABM display advertising isn't just about setting things in motion and wishing for success. It demands meticulous planning and strategic thinking to yield optimal outcomes.

When and in what manner should you initiate paid media campaigns?

Before you start thinking about any paid media activities you need to define your target account list. This is the basis that provides you with the details for correct segmentation and messaging accordingly. The most common accounts segmentation for paid media is made by the funnel stage. So, you could build an ABM paid media strategy with the specific needs of each segment, making ads more relevant and attractive for the people you're targeting.

Running paid media on the top of the funnel (TOFU) stage should be focused on educating your target audience and introducing your product/service. This can be done through blog posts, videos, and other types of content. In the middle of the funnel (MOFU) you should focus on presenting your product's/service's features and benefits, while in the bottom of the funnel (BOFU) you should focus on further emphasizing the benefits of your product/service and helping customers make an informed decision through reviews, limited special offers, or case studies that are relevant to the potential client's vertical. Moreover, using this stage for the upsell you should encourage them to use your software for more use cases.

Funnel stages and steps to do

TOFU

- Understand your target audience - outline their needs
- Map out the customer journey
- Craft value-packed content with unique angles to boost brand awareness and drive organic traffic

Metrics to look at:

- Low website/page traffic
- Irrelevant traffic
- High bounce rates
- Low conversion rates from visitors to leads on landing or blog pages

MOFU

- Glean insights from lead qualification data
- Educate and inform
- Segment and personalize
- Run lead nuturing campaigns
- Put together social proof and testimonials
- Retargeting and remarking

Metrics to look at:

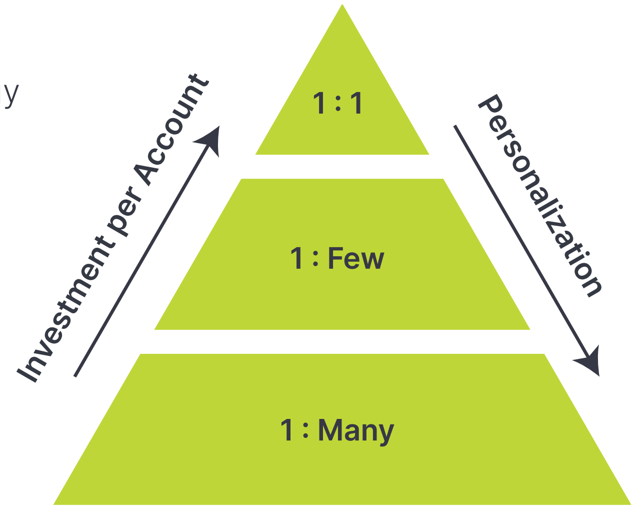
- Email open rates, CTR, and downloads
- Assess blog content effectiveness: views, time spent, social shares and scroll depth.

BOFU

To close more deals, focus on specific types of sales enablement content:

- Case studies
- Customer testimonials
- E-books
- Educational, social media content
- Sales or service page content
- Use remarketing audiences.

Coordinating your marketing strategy across multiple channels should be done with your ABM strategy (one-to-one, one-to-few, one-to-many), depending on which you will be able to define the budget per account and the level of personalization.



ABM one-to-one

- Map out each buying center.
- Understand where there may be revenue potential.
- Build out the organization chart and see which contacts we know and which we need to know.
- Research key business priorities and individual motivations.
- Identify relationships and connections to the account.
- Publish detailed account dossiers and maintain them quarterly.
- Engage internal chat groups or forums dedicated to each account.

ABM one-to-few

- 3-for-5 rule: Spend three minutes to find five key selling points to write an outbound email.
- 10-80-10 rule: Personalize the opening (10%), leverage templates with marketing's core messaging in the body (80%), then personalize the call-to-action at the end of the email (last 10%). This is where customization comes into play. Use broader generalizations for larger segments of your audience.

ABM one-to-many

- Use the help of automation
- Target these accounts with specific outbound tactics, sometimes customized by industry or solution

Each strategy should be chosen depending on the objective and purpose you set up at the beginning.

Strategy Type	Objective	Purpose
ABM one-to-many	Raise awareness	• Top-of-funnel prospecting • New-market entry
ABM one-to-few	Build pipeline	• Generation • Acceleration
ABM one-to-one	Close pipeline	• Closing • Upsell

Furthermore, the number of stakeholders involved in each deal has been steadily growing. Engaging the entire buying team is crucial, as broader organizational support often leads to a higher propensity to purchase.

There are three main categories of tracking and measuring your ABM sucess:

Engagement

Am I creating and deepening relationships with target accounts?

Journeys

How do accounts move through my buying journey to desired outcomes (e.g., pipeline and revenue)?

Attribution

Which marketing activities work? What's the return on investment of my marketing programs?

As you can see, it is more than just clicks and direct lead generation. Focus on measurable but gradual improvements such as:

Reach

Number of accounts that received at least one ad impression from the selected campaigns.

Interacted accounts

Number of accounts that met a threshold for significant website activity within the past 30 days.

CTR

The ratio of the number of clicks divided by the number of impressions served.

Lifted

Quantifies the difference in engagement before and after an ad campaign to show what effects, if any, the campaign has among your targeted accounts.

Of course, depending on the stage of the funnel your account is in you need to add additional metrics to see the outcome of your activities. In the TOFU stage your best friends are behavioral metrics (bounce rate, engagement rate). In the MOFU stage you could focus on click-through-rate (CTR), cost per click (CPC), marketing qualified accounts (MQA), etc. On this stage, adding some "classic" paid media parameters will help you in future optimisation, because the accounts are more engaged in the solutions you are providing. And last but not least, BOFU stage metrics: conversion rate (CR), customer acquisition cost (CAC), return on Investment (ROI) .

It's important to keep in mind that it will take time to see the impact on your pipeline. Additionally, don't forget to measure not only direct impact, but also influence parameters (influenced revenue, influenced opportunities etc.) for sales and marketing teams to understand the real performance of running campaigns.

Interesting resources to learn more:

1. Demandbase Advertising Basics (video and slides)
2. The Demandbase Advertising eBook
3. 4 Best Practices for Dynamic Personalization in B2B Advertising
4. Quick Ads Budget Calculator
5. Using the Advertising Media Planning Template (Video)
6. Navigating the Advertising Campaigns Dashboard (Video)

Resources:

July Demandbase Virtual User Group:
Demandbase Advertising Basics (video)

Chapter 5

How Advertising Can Accelerate Engagement in Your Modern Global Enterprise

By Jodi Lebow Director, Marketing, Hexagon
& Tyler Newberry,Global Account Based Marketing Manager, Global Demand Center, Hexagon

Get to Know Jodi Lebow

Connect on LinkedIn

Tyler Newberry

Connect on LinkedIn

Challenges of a modern global enterprise

Driving revenue for a global organization can often present unique challenges compared to smaller organizations. While SME's often enjoy the agility that comes with a narrow focus and a limited room of stakeholders, global enterprises often have to balance many voices in the room, with those voices usually an ocean away. Global marketing organizations must show value and contribute to the overall pipeline goals but may not actually "own" any accounts themselves, as regional teams often own the relationship with the accounts.

Then comes the question of how to segment the responsibilities of the global marketing team and the regional marketing team. How do you maximize the value each team is bringing to the table without getting in each other's way? How does global account for the localization and cultural differences throughout the world in their marketing tactics? The answer is proper alignment and clear responsibilities, but that is easier said than done. As ambitious marketers, we're all excited to show our target accounts what we've cooked up for them, but if regional and global are not coordinating this outreach, it can seem like a hot mess of information to the target account. And, regional teams often carry priorities that may not line up exactly with the global team's, so alignment is nearly impossible when you're not aligning to the same goals.

Navigating the landscape of global and regional team

What we've found works best

1:1 and 1:few campaigns led by regional teams

- Navigating handoffs between global and regional teams can be tricky, so if there are opportunities to eliminate those handoffs and have one team own the campaign from start to finish, it can create a more cohesive experience for the target account.
- 1:1 and 1:few accounts require a high level of personalization and benefit by deep account insights which can be leveraged by the region's closer relationship to the target accounts.

1:many campaigns led by global team

- One-to-many campaigns, especially those for net new prospect accounts often include brand campaigns, industry campaigns, solution campaigns, etc. This sort of higher-level, top-of-funnel messaging is where global teams excel in delivering at scale.
- Net new logo goals will differ from your goals for your customer marketing.
  - Some net new logo goals to consider: First website visit, repeat website visit, number of unique visitors, liking & sharing your content, registering for a webinar or watching on-demand.

Localization

- Localization can either be handled in region or outsourced.
  - If outsourced, ensure the work is vetted by someone in your organization with knowledge of the language and culture.
- Since localized campaigns often fall on the shoulders of regional teams no matter if they are 1:1, 1:few, 1:many, TOFU, MOFU, or BOFU, consider translating campaigns you already have running in English.
  - For example, if you have a brand campaign developed by the global team that is really helping trigger account engagement, consider translating that campaign into other languages.

Leveraging Demandbase Advertising to accelerate engagement

There are many reasons to use Demandbase Advertising as a tactic in your ABM campaign strategy. Demandbase ads:

- Are account-based and offer a wide reach across the globe
- Leverage engagement data and account insights
- Have a vast publisher network
- Offer persona prioritization
- Can be highly personalized
- Allow you to vary your messaging along the buyer's journey
- Are highly targeted (region, country, state)
- Have tight integration with Demandbase analytics

English vs Localized

English

Localized

Persona Ads

High level executive persona

Hands on, more technical persona

1:1 Example

Engaged vs Intent

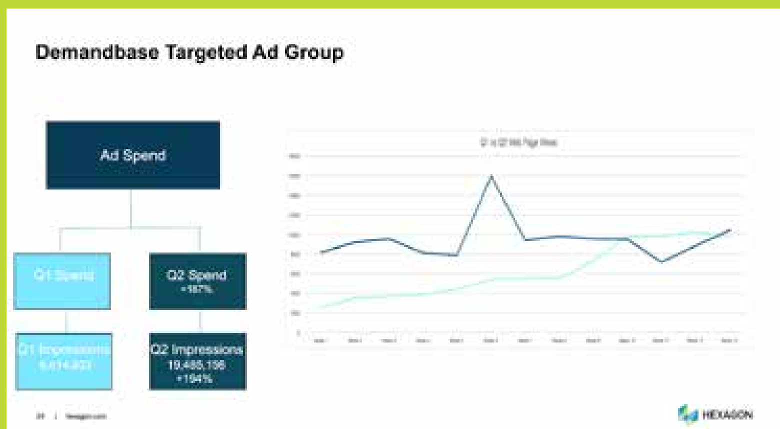
Engaged

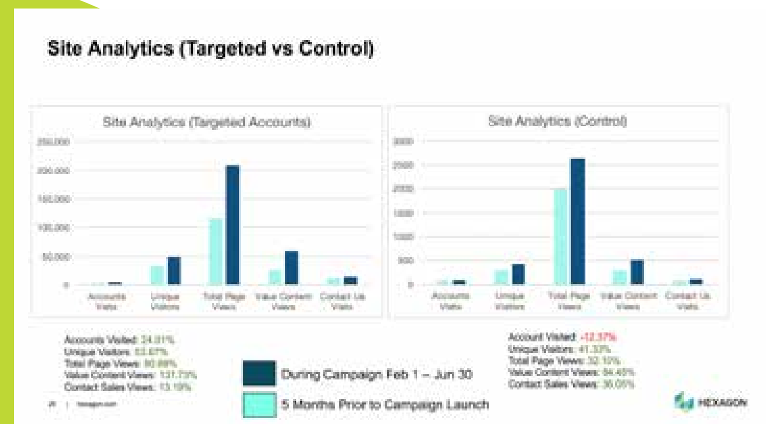
Intent

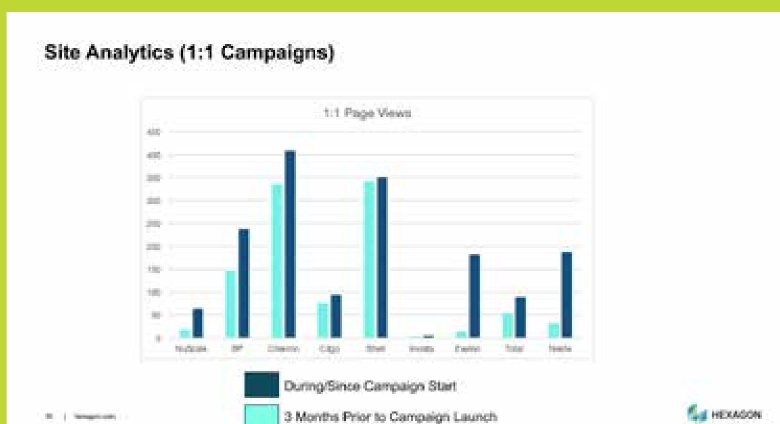
Reporting and ROI

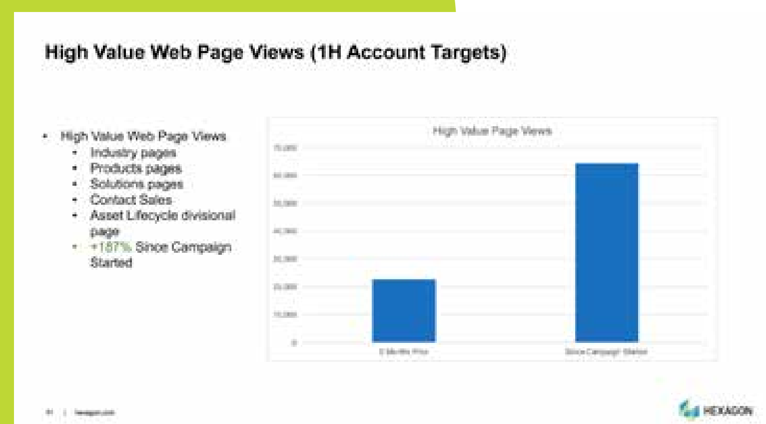
It's easy and often tempting to fall into a lull of reporting on the same metrics over and over again without looking at the bigger picture. Yes, metrics like clicks and CTR are important, but it's necessary to think beyond the click and focus on the outcomes your campaigns are aiming to achieve.

Think about how you can show your campaigns are affecting awareness, and engagement, opportunity progression. Leverage Demandbase analytics to see the impact with your target accounts.





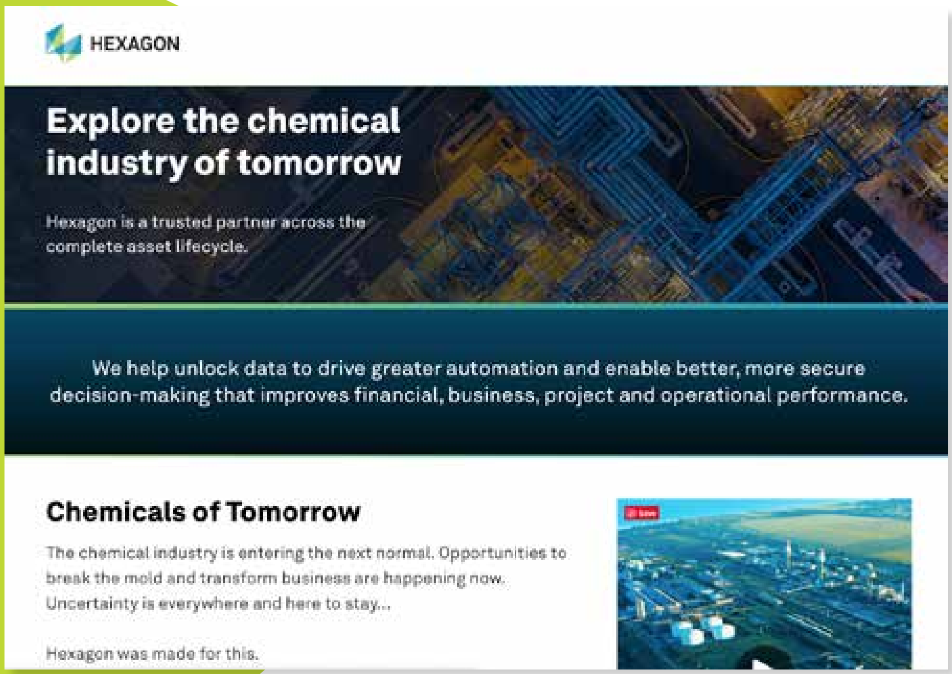




Tips for success

- Divide your accounts into tiers. Don't treat every account the same.
- Don't spread your budget too thin - ensure your message has the ability to have impact and avoid the peanut butter.
- Label your campaign tactics as global or regional to signify who owns it.
    - Coordinate your global and regional campaigns in the same document so everyone knows what the other is running.
- Accelerate the accounts that show interest early. Monitor and consider pulling accounts to avoid wasting budget.
- Have both evergreen and one-off campaigns. Evergreen campaigns are great for keeping that messaging in front of your target accounts and one-off campaigns can be great to achieve a more time-oriented outcome like helping a group of accounts reach MQA status by the end of the quarter, as an example.
- Vary messaging across the buying journey and be relevant!

- Test and optimize.
  - Regularly refresh your creatives to avoid fatigue, especially for evergreen campaigns. Swap out creatives every 4-6 weeks to keep performance high.
  - A/B test multiple creatives at the same time to see what resonates better.
- Rely on your region's cultural expertise.
- Marry advertising creative with the destination.
- Account for reachability in each region. This is very helpful when budgeting. The reachability will vary between regions and countries, so make sure you have an appropriate budget for the actual number of accounts you're going to reach and not just the total number of target accounts.
- Communicate, communicate, communicate.
  - The global team may think it's on the same page with the regions, but it's critical to have the plan communicated.
  - Example: if your agreement is that global will handle the TOFU and regions will handle the MOFU and BOFU, make sure this agreement is understood well in advance and have a timeline. (You don't want to spend a bunch of time and resources generating TOFU advertising only for the engaged accounts to sit on ice while the MOFU and BOFU are still being developed. Conversely, you don't want to develop MOFU and BOFU content with no engaged accounts to send it to.)



Resources:

How Demandbase Advertising Can Accelerate Engagement in Your Modern Global Enterprise ([Video])

Chapter 6

Building Robust, Data Driven Omni-Channel Campaigns for Your GTMs

by Paige Marsin, Digital Marketing Manager, Palo Alto Networks

Get to Know Paige Marsin

Connect on LinkedIn

Introduction

I'm Paige Marsin, business owner of the Demandbase tool at Palo Alto Networks, a global leader in cybersecurity. I help build the strategy for how our organization uses Demandbase, enable our users on the tool and create new use cases for leveraging the rich data and intel Demandbase provides.

When I first used Demandbase, I was shocked at how easily Demandbase was able to display account, contact, lead, and opportunity data in a highly consumable way, create reports, and launch dynamic campaigns. I immediately got to work on creating playbooks and hosting enablement sessions on how our organization could start to leverage the data and build robust omni-channel campaigns with minimum intervention from us as marketers.

This last fiscal year we launched 170 ad campaigns, globally, leveraging Demandbase's B2B DSP, in conjunction with Orchestration. We were able to automate the process of targeting accounts, contacts, and leads through an omni-channel approach, based on their buyer signals.

The Journey Stage strategy proved to be highly successful based on the increased lift in engagement and account progression to later stages.

Journey stage display ads and third party advertising

- We used Demandbase B2B DSP to target accounts at each stage of the funnel based on their journey stage criteria with personalized creative and landing pages.
- In combination with display ads we also leveraged audiences, within orchestration, to sync over the accounts (LinkedIn) and contacts to our third-party destinations for an omni-channel approach.

***Important side note:** Before I get into best practices for how to run these campaigns, I wanted to go over an important factor as it relates to the Journey Stages.*

As a large, complex organization with multiple go-to-markets, the challenge we face is that we can't use the out-of-the-box journey stages in Demandbase, as the journey stages are cross portfolio. As a workaround, while we await the much anticipated product release for multiple journey stages, we built out our own logic that would essentially mimic what the multiple journey stages by GTM would look and act like. We used this logic within each of the account and people lists used in the display ad campaigns as well as the audiences within orchestration.

If your company has multiple go-to-markets and product specific campaigns, this next section will provide you with best practices on how to build your journey stage campaigns.

Best practices for launching journey stage display ad campaigns for organizations who have multiple GTM's

1. Content and Creatives

- Ensure you have the right content and creatives to target your accounts at each stage of the funnel. Here is a content map that Demandbase provides, which can help to build out your content strategy for each stage.
- Start small. Align your creatives and landing pages to top of funnel (TOFU), middle of funnel (MOFU) and bottom of funnel (BOFU) campaigns.
- Don't use more than three creative sets per campaign. This will ensure you aren't diluting your budget and spreading it too thin.
- Personalized creatives tend to perform better and have a higher click through rate (CTR) on average, compared to non-personalized creatives.

2. Landing Pages

- Drive to a personalized landing page that offers various content paths, like a PathFactory or Demandbase personalized landing Page.
- Include a personalized chat bot, like Drift, to continue the personalized journey for the account once they hit the landing page.
- Implement a UTM naming convention in order to track performance and outcomes.

3. Target Account and People List

- Select your target account list (TAL) you'll be using in the campaigns account list and people list.
- For journey stage campaigns you'll want to ensure your account and people lists are dynamic. Which means accounts and people will dynamically move in and out of the campaign list, as they meet or no longer meet the selector criteria.
- Ensure your people list for the display ad meets size requirements, between 100-100k people, in order to be included.

4. Keyword Set

- Build out your keyword set to include more than 25 keywords related to your campaign, to prioritize accounts searching for those keywords.

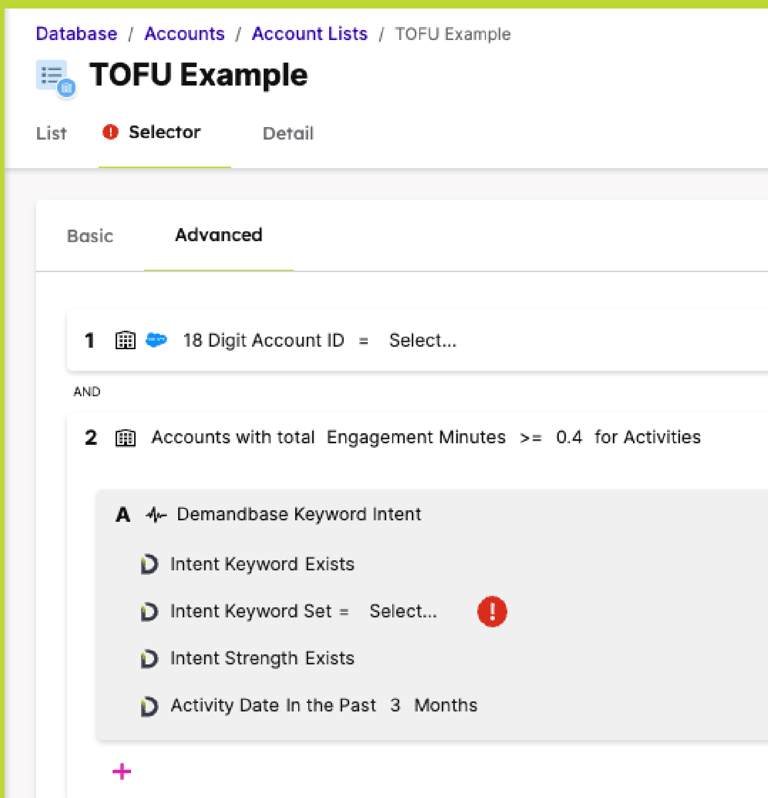
5. Budget

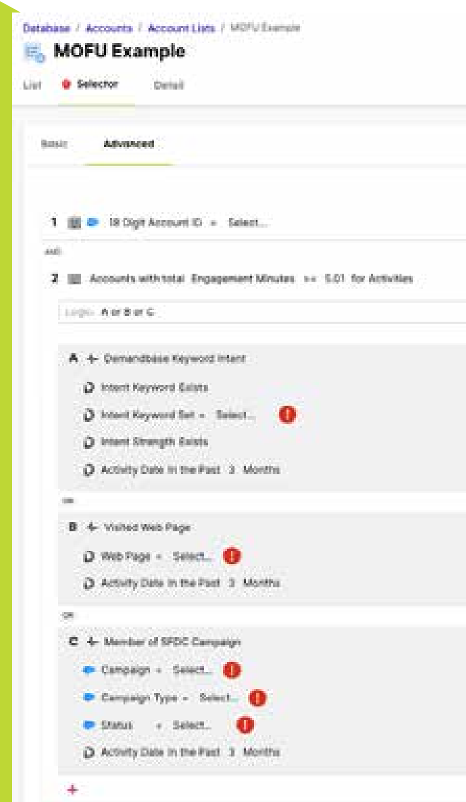
- Use Demandbase's budget calculator for 1:many campaigns to determine how much you need to spend to target your accounts. The calculator will take into consideration the number of accounts and flight time your campaign will be in-market. You can also use it to determine how many accounts you can target based on your fixed budget. From there, you can use Demandbase selectors to filter down on your target account list to get the list size to an optimal amount for your budget.

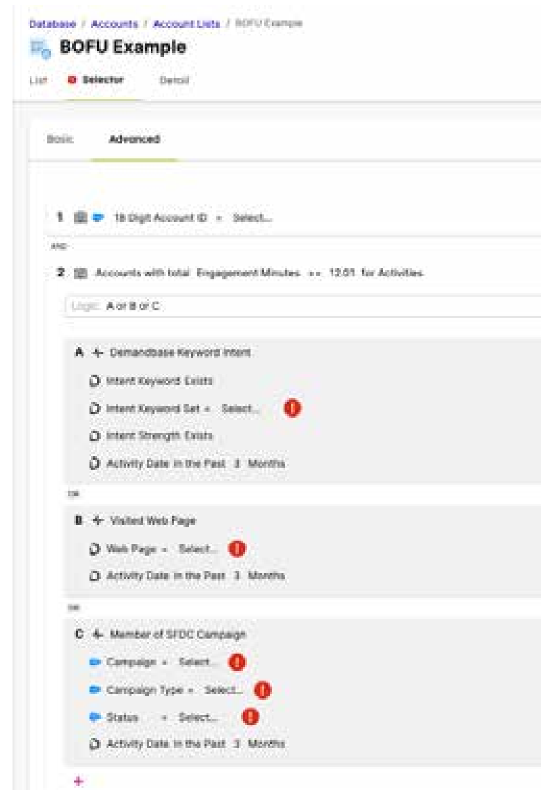
6. Selectors

- If your organization leverages the journey stages in Demandbase, skip this step and build out your account lists using your journey stages in your account selectors.
- If you have multiple products and are not able to leverage the out-of-the-box journey stages, these steps can help to target accounts showing intent and engagement at each stage of the funnel for each of your products.
- These are the top five selectors I recommend using in your TOFU, MOFU and BOFU journey stage campaign lists to ensure you target the right accounts that are showing buyers signals.
    - 18 digit account ID (or equivalent filter to pull in the target accounts you are wanting to market to)
    - Accounts with total Engagement Minutes for Activities (here is where you can play around with the ranges based on the TAL and the engagement they are showing)
    - Demandbase keyword Intent
    - Visiting web pages
    - Member of SFDC Campaign
- When building out these selectors for each stage of the campaign, you will want to ensure the queries have a range, like engagement minute ranges, to include and exclude accounts in other campaign lists. The range will depend on your display ad budget and how many accounts can be included, to keep the spend per month, per account, at a recommended amount.
- Reference the images below to give you an example of what the selectors could look like for account lists at each funnel stage, leveraging engagement minute ranges.

TOFU, MOFU & BOFU examples:







7. Track Metrics

- Demandbase makes it easy to track your campaign performance on the advertising dashboard. I recommend leveraging the summary tab which will show you the metrics for your campaign.
    - The creatives tab will give you performance metrics for your creatives.
    - Click on creative level reporting in the dropdown to view your creative metrics. I use CTR to track creative performance.
- Demandbase has guidelines for how to improve performance and ways to make iterations throughout the flight time, as well as benchmarks here.
- In addition to the metrics you can track within the advertising dashboard I also recommend tracking the account progression to later stages. There are a couple of ways you can do this. If you are using the out-of-the-box journey stages, you can use journeys within the analytics tab to measure account progression, velocity and conversion.
- If you have a complex GTM setup like ours, I recommend setting up your reporting through orchestration automations to track which accounts move in and out of the lists. Demandbase is also working on releasing an exciting new enhancement within analytics, called journey compare mode. Users will have the ability to easily compare a list of accounts you launched with at the start of the flight time compared to the end of the flight time, to track account progression into later stages. Which will be brilliant!

Leveraging orchestration alongside display ad campaigns for an omni-channel experience

In addition to display ads, we also leveraged orchestration audiences to sync over the accounts (LinkedIn) and contacts to our third-party destinations for an omni-channel approach. I recommend one of these two options for building out the audiences:

- Reference the account and people lists (using the "member of list" selector) that you've built out for your advertising campaigns, in orchestration, to sync over qualified accounts (LinkedIn) and people to your third party destinations. This is the easiest, most efficient way to build these lists.

OR

- Build out the logic in orchestration, natively, within the selectors, if you want the ability to adjust the ranges for your third-party advertising. A reason for doing this might be that with display, you have a more limited budget and aren't able to expand your BOFU list, but for third-party advertising you may have a larger budget and want to expand the engagement minute range to include more accounts/people in your third-party ads.

Journey stage campaigns are highly beneficial in targeting accounts where they are within their buyer journey. It is set up within Demandbase to dynamically target accounts and people within those accounts based on the selector criteria. Whether you are using the native journey stages within Demandbase or have built your own logic to fit the needs of your organization, Demandbase makes it easy to launch display ad campaigns within their B2B DSP, as well as third-party advertising through audiences within orchestration.

Chapter 7

A RevOps Guide to Create and Maintain a Fully Embedded ABM Strategy

by Nicole Morgan, Sr. Marketing Operations Specialist, Infor

Get to Know Nicole Morgan

Connect on LinkedIn

Introduction

Implementing and scaling an ABM (account-based marketing) strategy constitutes a pivotal challenge in an organization's journey. Frequently, organizations find themselves with an isolated ABM initiative that struggles to grow following an initial pilot phase. This occurs since ABM typically demands a transformation in perspective, processes, and operating models. All of which are noteworthy obstacles to surmount as they challenge current ways of operating and require buy in from stakeholders.

Addressing these challenges requires strong leadership, strategic planning, effective communication, enablement, and a dedicated commitment to cross-functional collaboration throughout the entire organization. Easy, right?

Rock solid RevOps function

It's widely acknowledged that a revenue operations (RevOps) team plays a pivotal role in creating and scaling a fully embedded go-to-market strategy. Research from Gartner predicts that 75% of companies will launch a RevOps unit by 2025.

The remit of the RevOps team is wide-ranging, encompassing a multitude of crucial responsibilities that directly impacts the organization's revenue generation and growth trajectory. This team serves as the catalyst for innovation, with a mission to break down silos, streamline workflows, and encourage the adoption of modern tech, especially ABM tools such as Demandbase. The significance of a well-structured and dynamic RevOps team cannot be overstated.

Workflows, automations, and integrations

A clear process is critical for RevOps and marketing ops professionals to focus on within the realm of ABM to drive strategic revenue growth and maximize the impact of targeted efforts. When you have established the right processes, workflows, and integrated systems, you can be confident that target accounts are being engaged precisely when criteria you've established are met. Put simply, how you characterize a marketing-qualified or engaged account and when it becomes suitable for marketing and sales teams to initiate outreach and run programs with these engaged accounts are determinations that the RevOps team will formulate and put into action through streamlined workflows.

RevOps responsibilities

Process:
Proper documentation, enablement, and adoption of ABM processes

Technology:
Data governance, integrations, scoring, routing, and automated workflows

Enablement:
Creation and delivery of learning objectives and training materials

Reporting:
Alignment on KPIs, business objectives, delivery, and continuous optimization

Let's put it all together

"If high/trending intent signals are identified for **[inset keywords or keyword sets]**, pipeline predict score **[insert name of the model]** is greater than or equal to **[insert your threshold]**, then assign **[insert object type]** to **[insert sales function]**"

How to get there:

1. Create multiple predictive models in Demandbase

Accurate predictive models are essential for pipeline opportunity predictions and can inform what happens next in your automated workflows or campaigns. Tailor the models to the unique sales cycles and go-to-market strategies of each segment for accurate predictions.

2. Create multiple keyword sets in Demandbase

Consider creating multiple keyword sets across industries/products, and leverage the keyword sets across different segments for accurate targeting in advertising efforts, account enrichment, and account assignments to reps.

3. Create ICPs and account lists in Demandbase

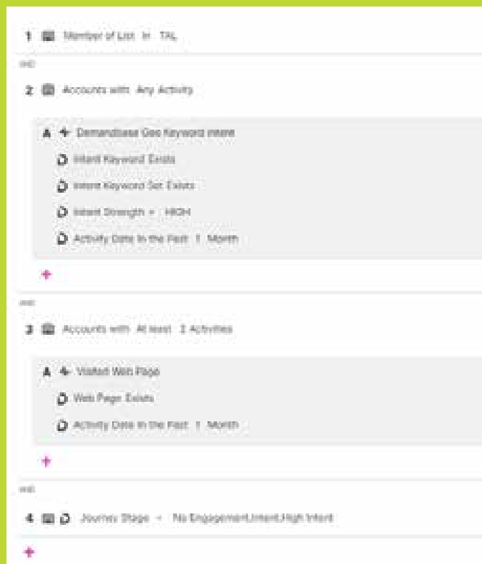
RevOps can help create ICPs and segment accounts into tiers.They are also entrusted with creating account lists for reps, a pivotal step that requires collaborating with different teams. RevOps can leverage CRM account ownership data, so each rep receives a tailored dynamic list of accounts.

4. Integrate Demandbase with CRM and/or routing tool

A direct CRM integration establishes a seamless flow of smarter intelligence account data into CRM and surfaces key insights directly within account records. The RevOps team acts as the architect of a connected ecosystem that empowers both sales and marketing to function harmoniously. Salesforce users can take advantage of the Demandbase iframe on the account object to streamline the research process. Through this integration, or with a separate routing tool, the RevOps team can enrich account records and automate the assignment of accounts directly in CRM, so that reps can get in front of the right accounts at the right time and ultimately drive better conversion rates and revenue growth.

5. Demandbase ad campaigns

Marketing is responsible for warming up accounts. Consider building a dynamic list of accounts using the Demandbase smarter intelligence selectors such as geo intent, recent web page visits, and journey stage. Then, drive target accounts to your company web pages and create a multi-channel strategy to continue driving engagement on target accounts, effectively increasing the pipeline predict scores on accounts that meet your ICP. Then, notify sales of engaged accounts or automate the assignment process.



6. Account prospecting process

RevOps can also outline the account prospecting process for reps and establish best practices to get in front of the buying group at target accounts.

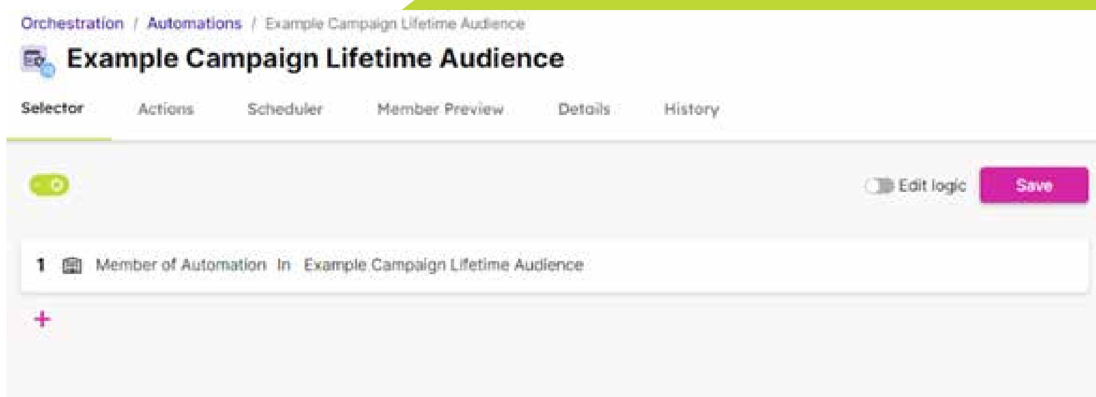
Streamline the prospecting process by integrating Demandbase with your sales engagement tool. Outreach users can leverage the Sales Intelligence iFrame directly in Outreach and seamlessly enroll contacts into sequences.

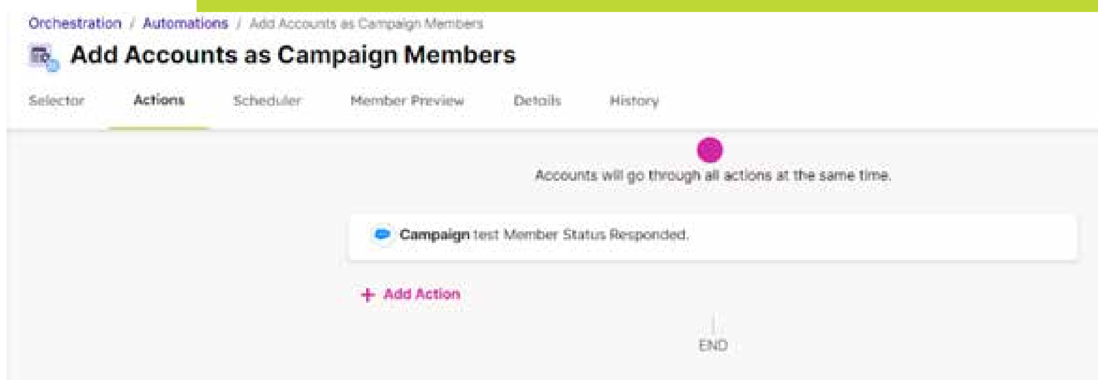
7. Reporting — dashboards and reports

Next, create a set of automations to capture the lifetime audience of the account list used in the ad campaign, and to add those accounts as campaign members to a Salesforce campaign.

Then, create a Salesforce report referencing the accounts as campaign members to report on opportunity creation, influence or progression and credit your ABM efforts where appropriate.

Remember, RevOps is responsible for tracking KPIs that measure the effectiveness of ABM efforts. Metrics include account engagement, pipeline progression, and revenue attribution. Finally, feedback loops with all teams involved are essential to identify areas for improvement and next steps.





8. Create a power user group

Lastly, as your ABM initiatives begin to mature, you might discover the need for heightened support. A highly effective approach is to establish a specialized power user cohort.

This team will consist of proficient users well-versed in the tool and its processes. These users consistently showcase their advanced expertise, offer valuable insights and guidance, and contribute to the ongoing enablement of programs and proper tool utilization. These users will rapidly set themselves apart because of their innate innovation, passion for technology, and dedication to initiating and embracing change.

Tips & Tricks

- Delegating to your operations team the task of establishing two power user cohorts – one focused on the sales division and another on marketing.
- Appoint leaders for each group who will oversee organizing session agendas.
- Establish a consistent schedule for regular meetings.
- Gather feedback on processes to continue fine tuning and scaling programs.

1...2...3... GO!

Whether referred to as marketing operations, sales operations, business operations, or revenue operations at your company, the operation teams stand as the linchpin of success.

Creating and maintaining a fully embedded ABM strategy requires thoughtful planning, relentless dedication, and strategic partnerships across the entire business. ABM is not just for sales or marketing, it's an entire business strategy.

Gather your team, document your vision, and embark on the journey of securing your position as a trailblazer in the world of ABM!