



eBook

# The Definitive Guide To Choosing An Account-Based Marketing Platform

**Considering an ABM solution?**

This guide details what to look for, so you can select the most appropriate vendor for your B2B go-to-market strategy.



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Introduction

# **A Framework for Account-Based Marketing Success and Smarter Go-To-Market**



# A Framework for Account-Based Marketing Success and Smarter Go-To-Market

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## What's driving ABM adoption? Results, results, results.

As ABM adoption has skyrocketed, companies are making key investments in technology to help them automate, scale, and accelerate their ABM initiatives. Given the ever-expanding list of technology vendors, it's become more difficult than ever to identify the right ABM solution that addresses the

entire customer journey. We're here to help you go-to-market smarter!

If you're looking for a suitable ABM solution, the questions and criteria in this guide (referencing everything from email/calendar logging, lead to account matching, data cleansing and more) can help inform your decision-making process, whether you're just starting with ABM or taking your go-to-market

strategy to the next level with account-based experience (ABX), which uses data and insights to orchestrate relevant and trusted marketing and sales actions throughout the B2B customer journey. And because you want to select the right solution and effectively implement it, we recommend evaluating vendors using the 5 Smarter GTM™ processes: **Build, Find, Engage, Close, and Measure.**

**Let's explore the processes in-depth to better understand how they can empower you to find the right ABM solution for your go-to-market needs.**



# GTM Success in 5 Steps

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**Build** your account-based foundation



**Find** and prioritize target accounts with AI-driven models and intent data



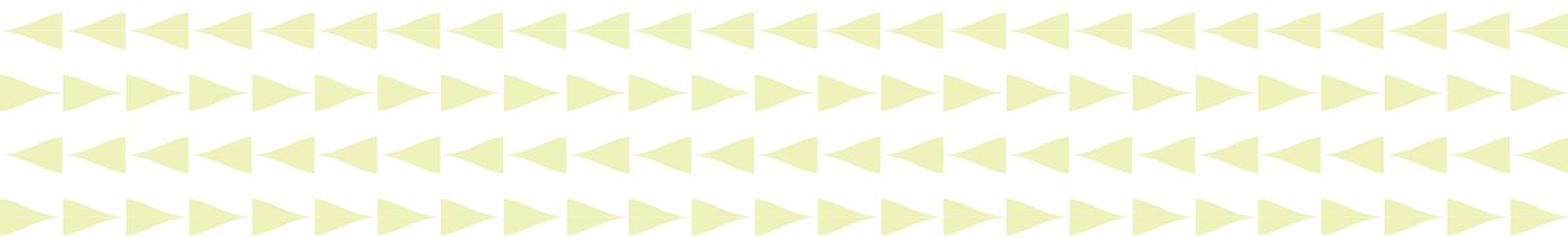
**Engage** with accounts and people via orchestrated plays across channels



**Close** deals and expand relationships by aligning with sales



**Measure** engagement across the buyer journey



# GTM Success in 5 Steps

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## □ Build

An account-based foundation starts with building a unified view of all your account data so marketing and sales can act as one team. Find a vendor who can connect your different sources of first and third party data in one platform, so you can create account and people lists and segment your market.

## □ Find

While having sales and marketing agree upon a target account list (TAL) is a good first step toward ABM, a TAL does not include all of the accounts that may be in-market for your offerings. That's where predictive analytics and intent come into play. AI, Machine Learning, and Intent helps you identify both known and unknown accounts that may be ready to buy.

## □ Engage

With an account-based approach, you are engaging accounts along the entire buyer journey, from awareness to post sale. You should find a vendor who can help you target accounts with unique experiences along the full buying journey. Whether it's advertising to your target accounts or orchestrating cross-channel plays, having an account-based lens throughout this experience ensures you are targeting the right accounts with the right message, not blasting out omni-channel spam that turns people off.

## □ Close

Once you've engaged accounts all along the buyer journey, it's time to win those deals. How? Sales insights and account intelligence help you understand what topics accounts are researching, who has engaged with your content, and thereby enables you to personalize messaging.

## □ Measure

Getting insights on the performance of your engagement activities along the buyer journey is essential for a successful account-based strategy, enabling you to prove and improve marketing's value. You should find a vendor who helps you measure account-based performance on a single platform.

## Vendor Onboarding and Support

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**Finding the right ABM partner for your needs takes time and diligence, but the payoffs are big.**

Once you have used our framework to evaluate an ABM solution, it's time to evaluate the support offerings of your preferred vendor options. Every provider has different levels of support and pricing tiers that will be key in the success of your deployment. If your top vendor options are comparable on features, then support and pricing may become determining factors.

Vendors might offer a specific number of hours for each phase or increased prioritization, as in this example:

|                        | Basic  | Premier  |
|------------------------|--|--|
| Implementation Support | 6 hours  | 10 hours   |
| Product Support        | <ul style="list-style-type: none"> <li>• 24/7 access to submit and view help requests via their success center</li> <li>• Standard support SLAs</li> </ul> | <ul style="list-style-type: none"> <li>• 24/7 access to submit and view help requests via their success center</li> <li>• Standard support SLAs</li> <li>• Priority ticket handling</li> </ul> |
| Professional Services  | 10 hours   | 20 hours   |

Note: This example is for reference only and is not specific to any vendor.

Part 1

# Build Your ABM Foundation

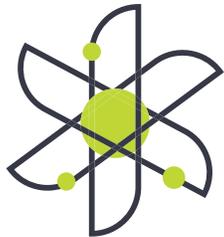


# Build Your ABM Foundation

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Your entire team needs to harmonize and act from the same playbook and single source of truth.

Any account-based effort must begin with creating a single view of all your account data, shareable across marketing and sales. Any ABM solution needs to:



**Connect** all your data



**Match** all data to the right account



**Segment** your audiences



**Maintain** and enrich account data automatically

# Why Does It Matter?

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**Misalignment between sales and marketing often occurs because both teams are looking at data in different systems, in different ways. A solution that can connect disparate data sources and provide one, unified view of accounts ensures that sales and marketing are looking at the same “source of truth.”**

Having access to all of your first and third party data in one, unified platform also helps you filter and segment your target account list based on specific activities, intent, website engagement, firmographics, and technographics. You have the capacity to “sense” intent and “respond” to it with relevant, timely engagement actions.

When all of your data is unified in one place, there’s no limit to the types of account and audience lists you can create. Finding a vendor who can combine different data objects into one list will not only save you endless (and endlessly boring) manual work, but also allows you to flex and scale your program faster.

Finally, data quality is absolutely foundational for building an account-based approach. Clean data in, high performance out. The insights you derive and actions you take are pointless if the data you base them on is inaccurate. Make sure you understand the data sources, data collection methodology and data hygiene practices of every vendor. Some ABM vendors will even offer solutions to help clean data in your CRM systems. For example, check out [Data Integrity](#) from Demandbase.



# Segment Management

## Connect disparate data sources and manage audiences

To foster the alignment of your marketing and sales teams, creating a unified view of all your account data is imperative. Make sure any vendor solution can:

- Connect with CRM.
- Connect with your Marketing Automation Platform.
- Let you upload any list.
- Create a single view of target accounts, people, and activity data.
- Enable you to easily use your audiences to execute via other channels like email campaigns, direct mail, advertising, or website personalization.

- Allow for segmentation across different object types like Accounts, People, Opportunities and Activities in one list.

Additional features to look for include the ability to:

- Expose additional data related to the accounts in your audience, including firmographic, technographic, intent, and engagement activity.
- Allow you to easily filter your audience by first and third party attributes like firmographics, technographic, intent, and site activity (and can those filtered audiences be saved?).
- Further refine and segment existing campaign, audience, or automation lists.



# Data Insights and Management

## Get trusted data and intelligence about accounts and contacts in one place



As you build your account-based foundation, there are multiple data types to consider, including technographics, firmographics, types of intent, interactions, etc. Pay attention to the differences in how data providers source their data to ensure their data quality meets your business needs. The following questions/criteria can help streamline your selection process. Does the data vendor:

- Get accurate company information including financials, employee counts, industries, and locations?
- Identify and deanonymize the account of any visitor on any webpage?
- Power your applications with API access to their data?
- Clean, unify, and visualize your CRM data with reliable, up-to-date data management?
- Provide proprietary intent data sourced using AI and natural language processing?

When looking at bringing data into your organization, you need a plan for how to operationalize it. Once you have evaluated and ensured the vendor's data quality, you should find out if the vendor can:

- Identify decision-makers at target accounts?
- See into a company's current tech stack and future technology needs?
- Predict what technologies a company will purchase next?

Part 2

# Find In-Market Accounts



# Find In-Market Accounts

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ABM requires focusing on the right in-market accounts who are most ready to purchase your offerings

While the criteria for an MQL has been generally accepted for the past few years, an account-based approach requires you to consider a prospect's readiness and desire to hear from you. The F.I.R.E. acronym (a framework for combining predictive analytics with specific business rules to select evergreen and triggered accounts) is built around:

**F**it  
**I**ntent  
**R**elationship  
**E**ngagement

*There is a lot of important information that can't be summarized here, so we recommend taking a look at [The Clear & Complete Guide to Smarter GTM™](#) starting on page 32 for the extended explanation.*

# Why Does It Matter?

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Finding in-market accounts is both an art and a science. The science part takes past opportunities and activities to build models that identify accounts likely to become an opportunity. The art part selects the right inputs to inform those models. These inputs should be based on what's important to your business and how you define your Ideal Customer Profile (ICP). A vendor who allows you to customize your predictive models based on specific inputs is putting your organization's interest first.

The acronym FIRE is a great framework for understanding when an account is in-market for your solution. **F**it is often referred to as your ICP, and you'll want a predictive model that helps you find more accounts that fall inside it. **I**ntent is the behavioral signals that help identify when an account is in-market for your offerings. **R**elationship is the context and history you have with the account. Finally, **E**ngagement is the time spent with your company. Creating a predictive model around these FIRE elements ensures you are finding the best-fit accounts who are in-market for your solution.

Once you've discovered accounts that are in-market, building a **Target Account List (TAL)** is next. Being able to build an account list from different selection criteria across different object types not only saves you time, but also gives you a granular level of segmentation for any campaign type. Review the next section on account selection to identify features important in creating an account list.



# Predictive Analytics

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**A combo of intent, AI, and machine learning to power your ABM**



Predictive analytics takes data about accounts that have progressed to a certain stage of the buying process and uses it to find other accounts that look most like them. Combining firmographics and technographics with predictive analytics can provide a more accurate representation of which accounts in your tier lists are actually ready and interested in your offering. As you delve into the technical analysis of the predictive capabilities of your ABM solution RFPs, ask yourself — does the vendor:

- Allow you to customize and build models and scores that predict the likelihood of a sales opportunity?
- Have multiple models to predict opportunities for multiple product lines or business units?
- Allow you to customize and build models and scores to identify your target customer profile?

A number of vendors could be offering all of these options. The key differentiator might be timing. How fast can each of your vendor options run their predictive analytics capabilities? Can any of them quickly build and train their predictive models to get you up and running in 24 hours?

# Account Selection

## Build dynamic target account lists that include the right accounts



You can't be account-based if your systems are still built around the lead. When researching your options, these questions/criteria can help streamline your selection process.

Does the vendor:

- Identify accounts based on a variety of data, including firmographic, technographic, behavioral and intent signals?
- Go beyond company-level firmographics to understand individual buyers at key accounts?
- Score, rank and provide insights into existing, known accounts?
- Help identify accounts outside of your existing CRM data?
- Leverage Artificial Intelligence (AI) technologies to identify buying signals in real-time?
- Use segmentation defined in the account selection environment to drive site customization?
- Customize account stages to your specific business needs?
- Enable cross-sell and upsell through post-sales account stages?

Take things further and look ahead to find out if they also:

- Provide direct activation into marketing channels from the target account list?
- Enable sales intelligence alerts based on audiences created in the account selection environment?
- Enable an engagement model for individuals that measures known activity?

Part 3

# Engage Accounts



# Engage Accounts

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**Nurture and convert prospects and customers with relevant content for the right account at the right time.**

Once you build your account-based foundation and your TAL, it's time to leverage a multi-channel, personalized approach to account messaging.

With your accounts properly tiered, you can focus on providing personalized, specific, actionable insights or best practices that will drive account engagement. You should share useful information that educates the buyers in an account and helps them solve their business challenges. When you provide more value, you get more and better engagement.



# Why Does it Matter?

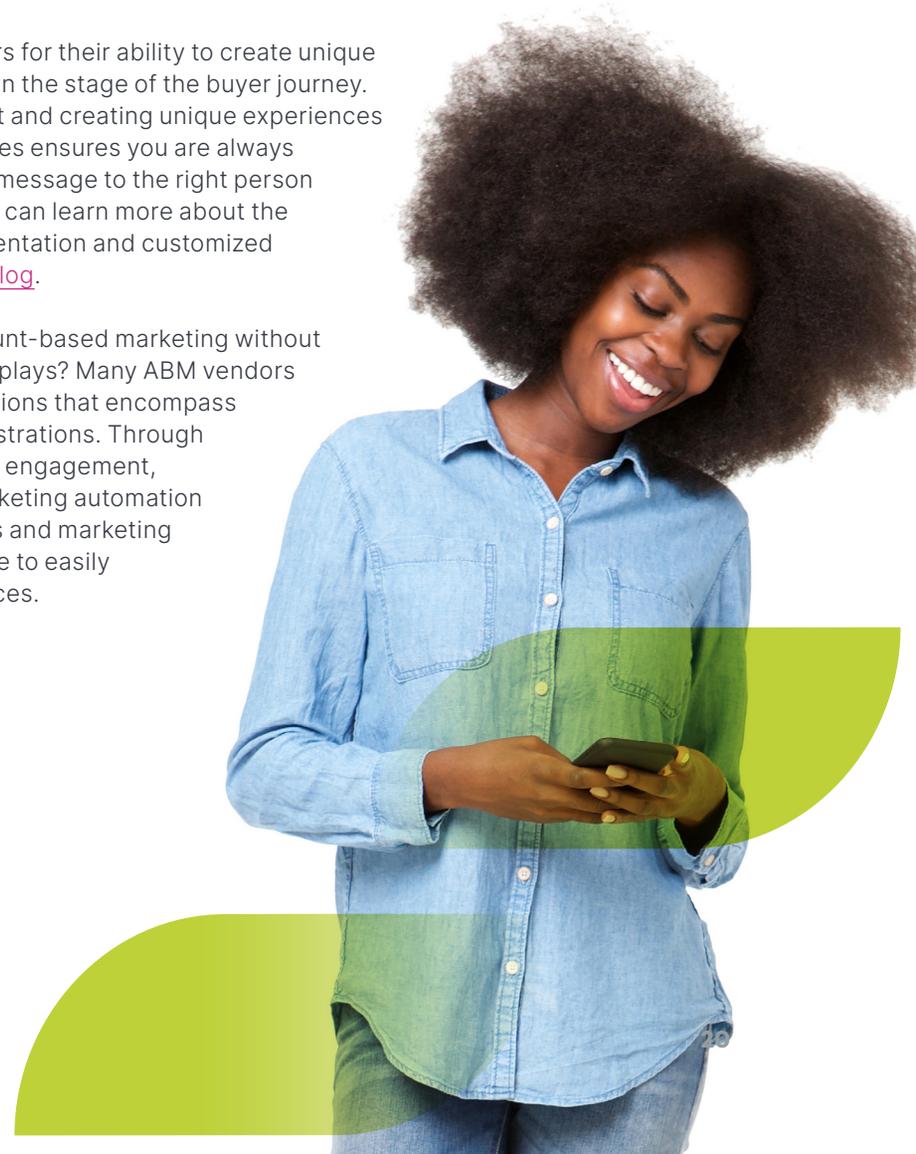
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Now that you've built your account-based foundation, discovered accounts in-market for your solution and created your target account lists, the marketing part of account-based marketing comes in. Vendors that can seamlessly target accounts on your list and engage them through different channels in a single, unified platform **help you execute on your account-based experience (ABX) strategy**. These vendors not only empower you to use first and third party data to inform your account lists, but also leverage connections to multiple channels from the same platform ([hello orchestration](#)) to ensure a customer's buying journey is seamless and omni-channel.

From an advertising standpoint, it's important to select an ABM vendor who uses a B2B DSP. Check out this [blog](#) for the important differences between a B2B and B2C DSP. One of the key differences is that a B2B DSP can help to balance impressions across your target accounts.

Also evaluate vendors for their ability to create unique experiences based on the stage of the buyer journey. Having a dynamic list and creating unique experiences for different audiences ensures you are always presenting the right message to the right person at the right time. You can learn more about the importance of segmentation and customized experiences in this [blog](#).

Finally, what is account-based marketing without marketing and sales plays? Many ABM vendors provide holistic solutions that encompass multi-channel orchestrations. Through connections to sales engagement, advertising, and marketing automation platforms, both sales and marketing teams can coordinate to easily engage their audiences.



# Advertising

## Run targeted advertising campaigns that reach the right individuals and accounts



Now that you know how your ABM solution can help you research and reach your target accounts, it's time for you to ensure they see the messages you've prepared for them. As you evaluate your vendor options, these questions/criteria can help streamline your selection process.

Does the vendor:

- Use a purpose-built B2B DSP to target B2B accounts?
- Run campaigns that target key accounts, and buying committees within those accounts, and optimize bids based on their intent?
- Protect brand safety through mechanisms such as whitelists?
- Provide transparency into its targeting data, its sources and how it is derived?
- Offer dynamic ad creative that is responsive to company, industry and other attributes at the impression level?
- Target and personalize advertising using a combination of IP, cookie and first party data?

- Leverage AI to manage frequency caps and budgets appropriately and optimize bids for the right users at the right accounts more evenly?
- Offer named account service personnel to partner with you from strategy through execution?

To ensure the best possible experience for you and your customers, find out if vendors also:

- Offer transparency with its whitelist?
- Provide campaign delivery reporting at the domain level?
- Allow you to serve personalized ads on an anonymous basis?
- Provide campaign reporting using B2B metrics?
- Support the creation of advertising campaigns directly from account lists and filtered account list audiences?

# Website Personalization

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**Deliver personalized website experiences and surface content based on individual visitors**



We invest significant resources driving visitors to our websites. But the game is far from over once they arrive. In ABX, you need to turn visits into engagement – and nothing beats a personalized experience. Using web personalization technology, you can identify the company and industry that a visitor belongs to, then serve up images, case studies, and offers tailored to that account or industry.

Ensure that any ABM vendor can:

- Identify known and anonymous visitors.
- Personalize headlines, website heroes, CTAs, promos all on a single webpage.
- Allow you to create multiple web page experiences for different stages of the customer journey.
- Integrate with web forms for lead enrichment.
- Use dynamic lists and segmentation to ensure your accounts are always getting the right experience at the right time.

As an added bonus, does the vendor also:

- Let you build customizable, personalized experiences for known and unknown visitors?
- Support integrations with related platforms like CMS and A/B testing platforms?

# Orchestration

## Orchestrate account engagement across channels



Done correctly, orchestration ensures that the moving parts in an ABX play are synchronized across your organization's customer-facing teams so you can achieve your business goals at the target account. A key component of orchestration is combining different channels and different people from various departments. A multi-channel approach spreads your risk and increases your chance of a response. Evaluate each of the vendor proposals based on the following criteria.

Does the vendor:

- Dynamically move accounts/people into specific email campaigns based on trigger points?
- Automatically change lead/contact status within CRM campaigns?
- Automate the creation of CRM tasks?
- Define the segment based on all available data from across CRM/MAS/Inbox activities?

- Automatically change/update people/account/opportunity data within SFDC based on rules?
- Automatically add/remove people from Salesloft/Outreach/CRM campaigns?

Beyond these features, a good ABM solution should also allow you to:

- Dynamically move accounts into specific advertising campaigns based on trigger points.
- Offer advanced/recurring scheduling options.

Part 4

# Close Accounts



# Close Accounts

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You close more deals when your entire team organizes around the customer's journey, understanding customer needs and addressing them as they arise.

Closing on a marketing effort requires near-perfect alignment between customer-focused teams as well as delivering prospects a consistent message and enjoyable experiences. Achieving this feat requires three levels of maturity:



Communication



Activation



Orchestrations

# Why Does It Matter?

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**From building an account-based foundation to engaging accounts, marketing and sales must be aligned across the account journey. Why? Account-based marketing is not just for marketers. Sales is key for ensuring a successful ABM and ABX strategy. After all, closing accounts and winning business relies heavily on your sales team.**

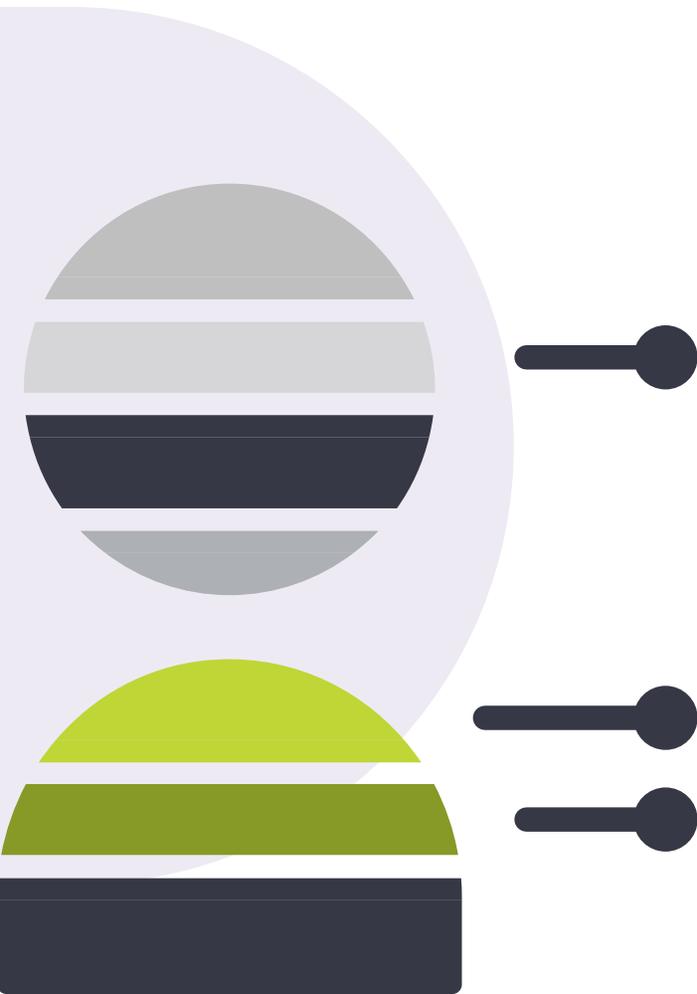
That's why sales intelligence is one of the most important aspects to evaluate with an ABM vendor. Insights from trending or high intent data can give you an idea of the type of messages to use to personalize your sales outreach. Information on corporate relationships and hierarchies help you understand when more than one buying committee from an organization is engaged. News about prospects helps you devise your communication strategy. Understanding which people at an account are the most engaged helps you see where there are gaps in your multi-threaded approach.

Of course, there's a lot a sales rep can do with the right insights delivered at the right time. An evaluation of insight delivery mechanisms and sales alerts is important. Real-time sales insights through Slack, for example, can help sales respond quickly when prospects are searching on their website. A browser extension can help sales take action from any website prospects are visiting. And of course, all of these insights delivered via CRM save the rep time and drive efficiency. In short, sales intelligence delivered at the right time can make a huge impact in achieving pipeline goals.



# Sales Intelligence

## Inform sales strategy with meaningful insights



To prevent a disjointed experience for the customer, one where sales and marketing aren't aligned and where clumsy "baton-passes" are common, ABX (next-level ABM) delivers an orchestrated approach and process. Ensuring that your prospective ABM solution meets all required levels of alignment (communication, activation, and orchestration) will deliver a smoother customer experience and an integrated, successful closing on an account.

To ensure you acquire the right solution, find out if the vendor can:

- Deliver sales insights in CRM, on a browser extension, email and other chat tools like Slack.
- Automatically log emails and calendar activities into the ABM Platform.
- Provide intent, deal story, communication history and people highlights all within CRM.
- Get the latest and most actionable news about prospects with curated news and social insights?

- Provide actionable sales insights that are customizable by sales rep.
- Build highly targeted lists of qualified prospects and customize your lists using dozens of filters, including news and keywords.
- Optimize account-based efforts by understanding how accounts relate to each other through corporate hierarchies.

Additionally, these points can help you select the best provider. Does the vendor:

- Deliver sales insights in real-time or close to real-time?
- Deliver insights based on website engagement? If so, do they differentiate the type of visit?
- Make it easy for sales to take action on accounts and people in sales engagement platforms from the ABM Platform?

Part 5

# Measure Performance



# Measure Performance

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That which is measured can be improved. Set up a feedback loop of performance data to drive ABM/ABX improvement.

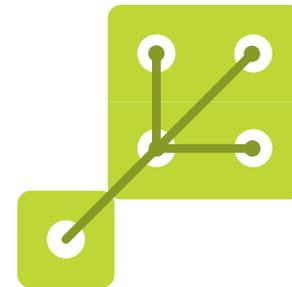
ABX is about quality, not quantity. Traditional metrics for ABM success are not useful in the experience-centric realm. The new and more complex benchmarks for measuring success revolve around:



Relationship Analytics



Journey Analytics



Attribution Analytics

Get ready to measure engagement like never before!

# Why Does It Matter?

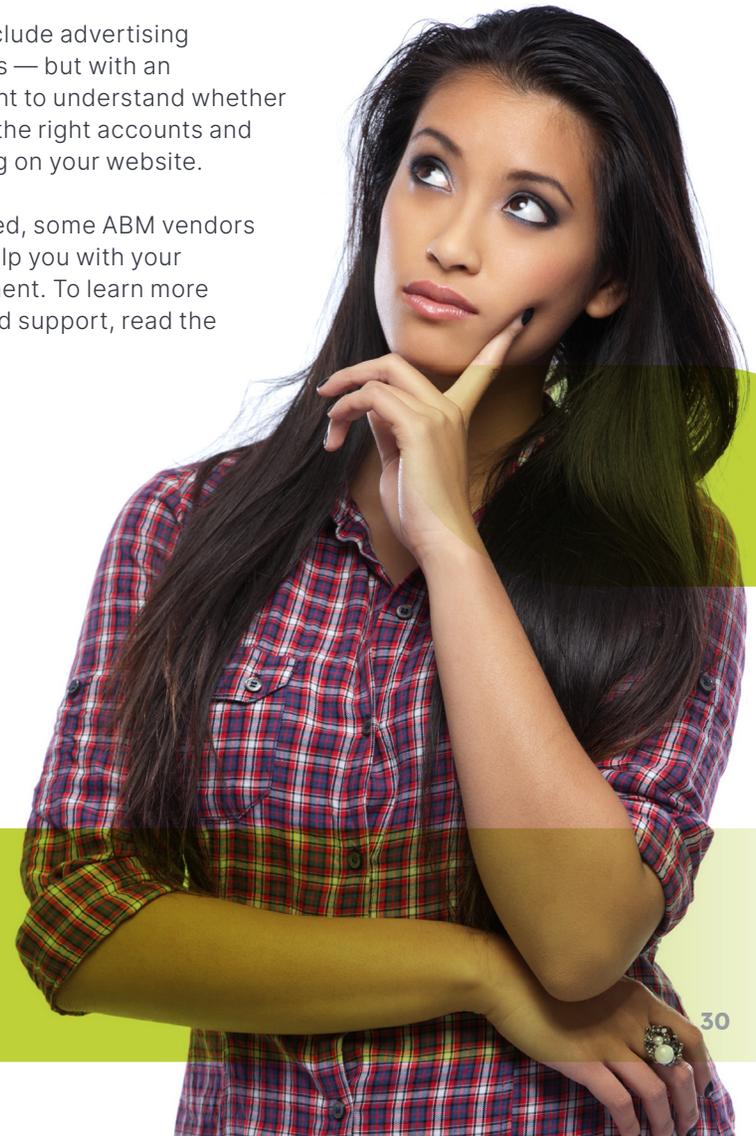
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**Once you've successfully closed accounts, you want to make sure you understand which account-based programs contributed to that sale so you can rinse and repeat. You must evaluate how a vendor measures success across your account-based programs. Choose a vendor who can help you optimize your programs from the top of the funnel to the bottom, and grow your customer's lifetime value.**

Some examples of metrics to measure include the volume and velocity of an account as it makes its way through the buyer journey. Understanding this helps you see whether your programs are engaging enough, as well as whether your sales cycle is too long. A strong ABM vendor will also have different methods for measuring attribution.

Other metrics to consider include advertising campaigns and website visits — but with an account-based lens. You want to understand whether your advertising is reaching the right accounts and which accounts are engaging on your website.

If you find you're short-staffed, some ABM vendors offer strategic services to help you with your ABM strategy and measurement. To learn more about vendor onboarding and support, read the next section.



# Reporting and Analytics

## Measure the performance of your go-to-market strategy



When it comes to measuring the performance of the ABM solution from a customer experience perspective, the scope also changes.

The vendors on your shortlist should, among other features:

- Offer a dashboard to measure ABX impact, for insights across the buyer journey.
  - Track volume, velocity and conversion metrics for each journey stage.
  - Offer customizable subscriptions for all custom reports.
  - Provide people and account based heatmaps.
  - Allow you to combine first party, third party, firmographic and technographic data for segmentation and reporting.
  - Allow you to compare the performance of different audiences or account lists and evaluate the impact of specific programs.
- Enable you to see the engagement and activities that influenced the different stages of a deal cycle.
- Measuring a journey and a relationship in the long-term requires measuring as much data as possible, so find out if they also:
- Centralize your existing data sources in one location?
  - Track B2B metrics by account?
  - Track and report on anonymous first-touch visitors by account?
  - Have strategic services in place to help you set up ROI reporting based on your strategies?
  - Allow you to compare different timeframes for account stages?
  - Provide advanced BI capabilities for ABM?

Part 6

# Vendor Onboarding and Support



# Vendor Onboarding and Support

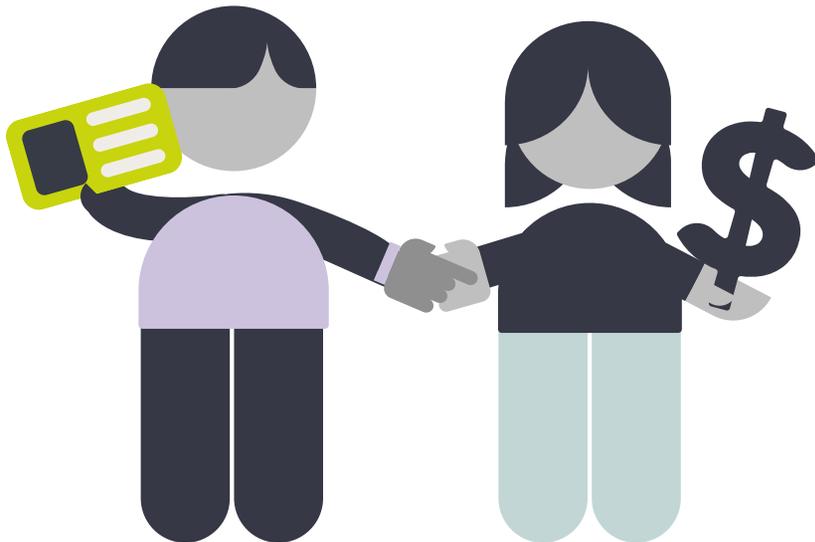
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**A great ABM partner doesn't just "sell" a solution but helps you succeed with it every step of your go-to-market journey.**

Having a top account-based solution is a great start, but you also need to know the level of support a vendor will provide once the partnership begins.

To build the best experience for your prospects, leads, and accounts, you want a solution provider who meets your needs not just during deployment, but beyond.

Can the vendor support you through different levels of strategy maturity, from ABM to ABX?

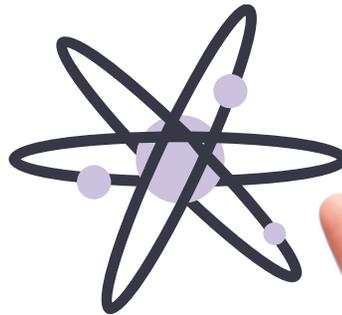


# Why Does It Matter?

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As you can tell from this buying guide, there's a lot to consider when it comes to evaluating ABM vendors. However, evaluating the platform alone is not enough. For example, if you're new to account-based marketing, you may be looking for some help in starting out with a simple ABM strategy. If you're more advanced, you may be looking for help to bring your strategy to the next level with account-based experience.

You should consider whether the vendor can help with the different maturity levels of an account-based program. Can the vendor provide you with enough resources to support your team? Can the vendor support you with technical or strategic consulting? How much can you learn from the ABM vendor? Wherever you are in your ABM journey, the amount of vendor onboarding and support available should also be considered in your evaluation.



# Vendor Onboarding and Support

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Get up and running and start delivering value quickly

When researching your options, these questions/criteria can help streamline your selection process. Does the vendor:

- Provide on-demand and custom training sessions?
- Provide strategic ABM workshops, best practices and thought-leadership materials?
- Offer strategic ABM support from seasoned marketers?
- Offer managed services for program optimization, reporting & insights and operational enablement?
- Offer ABM certification courses?
- Offer full day strategic workshops?
- Offer strategic support for custom reporting and analysis?

If your top vendor options check these boxes, find out if they also:

- Deliver quick time to value?
- Conduct performance reviews on a quarterly basis?
- Provide relevant ongoing topical office hours?
- Offer technical consulting?



# Software in the Era of Experience

Although technology sometimes has capabilities beyond what we use it for, this isn't always the case. For account-based marketing, the key is the experience.

As you search for a solution that can help your business grow, remember the basic principles outlined in this guide and use them as a [checklist](#) to ensure that you'll be in good hands with both the software and the vendor. Every question and criteria outlined in the previous pages was compiled based on researched best practices and lived experiences within our own ecosystem.

When you lead with experience — and keep in mind the processes to Build, Find, Engage, Close, and Measure — you'll land in good hands and, most importantly, your customers will too.

**This is how you do Smarter Go-To-Market™.**

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Demandbase is Smarter GTM™ for B2B brands. We help marketing and sales teams spot the juiciest opportunities earlier and progress them faster by injecting Account Intelligence into every step of the buyer journey and orchestrating every action. For more information about Demandbase, visit [www.demandbase.com](http://www.demandbase.com)

