

# BLUEPRINT

to **ACCOUNT-BASED MARKETING**

A B2B Marketer's Guide to Getting Started with ABM



# TABLE OF CONTENTS

INTRODUCTION .....	03
PART ONE: Introduction to Account-Based Marketing .....	04
PART TWO: 7 Steps to Getting Started with Account-Based Marketing .....	16
PART THREE: 7 Must-Try Account-Based Marketing Strategies .....	30
PART FOUR: How to Measure and Optimize Your ABM Campaigns .....	44
CONCLUSION .....	50
WORKSHEETS .....	51



## > INTRODUCTION

Welcome to the Blueprint to Account-Based Marketing: A B2B Marketer's Guide to Getting Started with ABM. Whether your marketing and sales teams plan to go all-in on account-based marketing or simply add ABM to your current strategy, this e-book will guide you through the process. Think of it as a complete blueprint for planning, building, executing, and measuring successful ABM campaigns at scale. Pretty handy, right?

The e-book includes:

- An explanation and history of account-based marketing
- Key benefits of adopting an ABM strategy
- A breakdown of the #FlipMyFunnel model to ABM
- The steps you can take to implement a successful account-based marketing strategy
- Must-try ABM campaigns for a variety of business goals and challenges
- Account-based marketing KPIs to measure — and those to ignore
- How to optimize your ABM campaigns for B2B success
- Worksheets and checklists to help you plan and execute your strategy

Let's dive in.

“

Now the time has come for B2B marketers to adapt to account-based marketing.

The essential definition of ABM is laser-focused B2B marketing. Identifying and targeting key accounts has always been a best practice, but what's different today is how improved technology gives marketers the ability to do ABM at scale.



– **SANGRAM VAJRE**  
CMO & Co-Founder at Terminus,  
Author of *Account-Based Marketing for Dummies*





# PART ONE

## Introduction to Account-Based Marketing



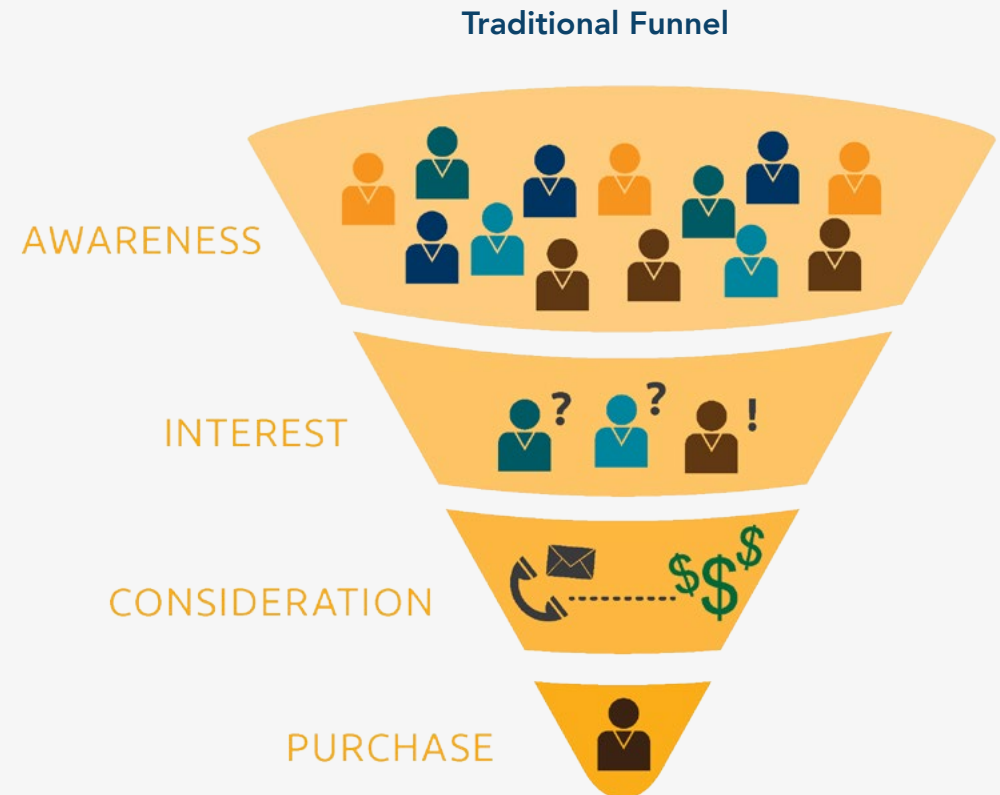
# WHAT IS ACCOUNT-BASED MARKETING?

**Account-Based Marketing (ABM):** A focused approach to B2B marketing in which marketing and sales teams work together to target best-fit accounts and turn them into customers.

The traditional B2B funnel is broken. In its current form, B2B marketing takes a broad approach to lead generation with the goal of capturing as many leads as possible. The inherent issue with this approach is that the funnel gets smaller towards the bottom, so the vast majority of B2B leads — over 99%, according to Forrester Research — never become customers.

## Flipping the Funnel

Account-based marketing, on the other hand, flips the funnel on its head. Instead of starting with marketing channels, an ABM strategy begins with identifying and targeting best-fit accounts. Marketers can then serve personalized messaging to decision-makers at these accounts on the channels they are actively using.



# WHAT IS ACCOUNT-BASED MARKETING?

## The #FlipMyFunnel Model for ABM



© #FlipMyFunnel

## There are five stages of the #FlipMyFunnel model for ABM:

### 1. Identify

First, your B2B marketing and sales teams must collaborate on a list of target accounts, or the companies that are the best fit for your solution. To do this, it's crucial that you agree on your ideal customer profile or ICP. More on this in [Part Two](#).

### 2. Expand

Next, you'll take your list of target accounts and expand the company profiles with the contact information of key stakeholders and decision-makers.

### 3. Engage

Once you've expanded your account information, you'll execute your omnichannel marketing plan and begin to engage contacts in your target accounts. Your marketing automation platform and ABM technology will be instrumental in this stage as you employ a variety of sales and marketing tactics such as content marketing, events, personalized emails, and phone calls.

### 4. Advocate

Even after your sales team successfully closes a deal, your marketing team's job isn't over. After all, satisfied customers and brand advocates are one of the most valuable forms of marketing. Joseph Jaffe, author of *Flip the Funnel*, estimates that acquiring a new customer via an existing customer costs one-third as much as other methods of acquisition.

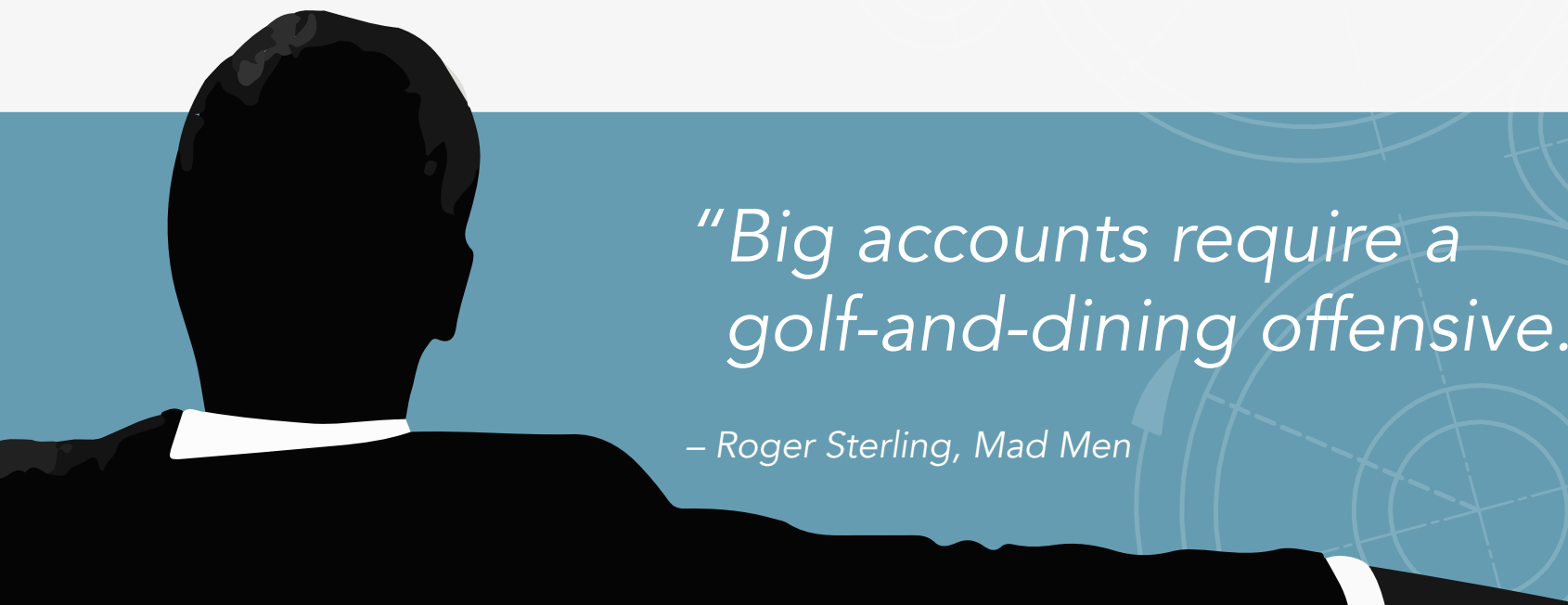
### 5. Measure

Last but not least, you'll need to measure the success of your ABM campaigns by focusing on account-level KPIs that reflect your marketing team's contribution to pipeline and revenue (ROI).





# THE HISTORY OF ACCOUNT-BASED MARKETING



*“Big accounts require a golf-and-dining offensive.”*

*– Roger Sterling, Mad Men*

The concept of targeting and nurturing relationships with high-value accounts is nothing new — after all, *Mad Men* were doing it back in the 1950s! It's the reason salespeople wine and dine prospective clients, and it's why marketers host exclusive events for their top customers.

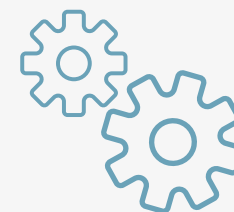
What is new is the technology that makes account-based marketing scalable.

Read on to learn how account-based marketing evolved from *Mad Men*-era tactics to the ABM we know and love today.



# THE HISTORY OF ACCOUNT-BASED MARKETING

Modern account-based marketing has its roots in the 1990s, when marketers began to realize the need for more personalized marketing. The following timeline gives an overview of how a personalized marketing mindset plus more sophisticated technology led to the ABM revolution.



**1993**

Don Peppers and Martha Rogers publish *The One to One Future*, a revolutionary book forecasting the shift from mass marketing to personalized, customer-focused marketing.

**1999**

Salesforce introduces the first software-as-a-service CRM.

**2004**

ITSMA coins the phrase account-based marketing.

**2006-2008**

Marketing automation software expands from email marketing to multichannel marketing.

**2012-2014**

Account-based marketing tools, including Terminus, rapidly enter the martech market.

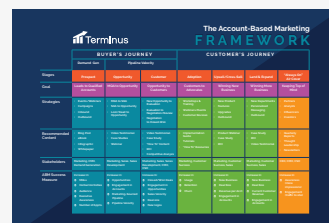




# THE HISTORY OF ACCOUNT-BASED MARKETING



#FlipMyFunnel



**May 2015**

Sangram Vajre introduces the #FlipMyFunnel approach to B2B marketing.

**August 2015**

Terminus hosts #FlipMyFunnel Atlanta, the first-ever B2B marketing and sales conference for ABM.

**October 2015**

G2 Crowd is the first software review company to establish an account-based marketing category.

**December 2015**

Terminus publishes the first account-based marketing framework designed to help marketers put ABM into practice at all stages of the customer journey.

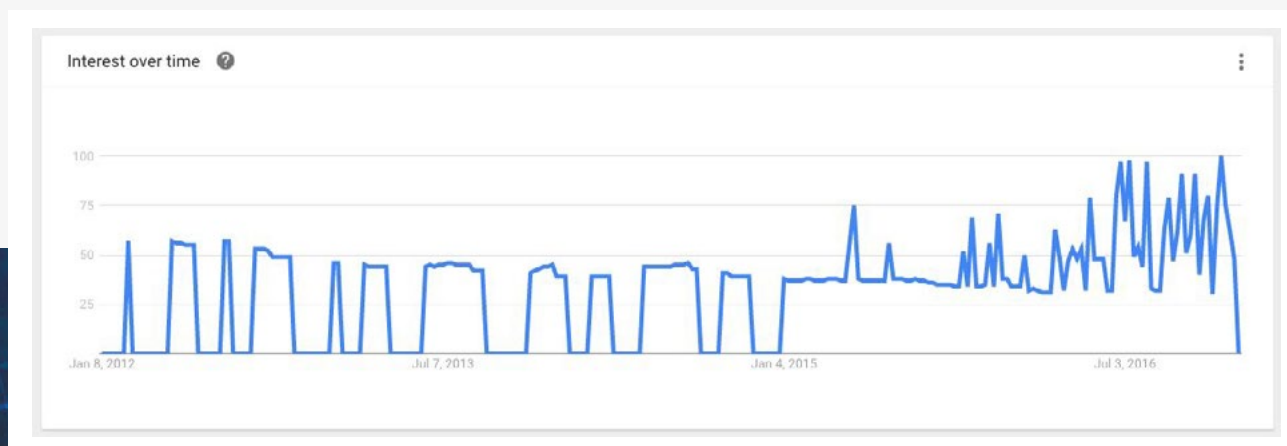
**April 2016**

Wiley publishes Sangram Vajre's *Account-Based Marketing for Dummies*, the first-ever book with account-based marketing in the title.



# THE HISTORY OF ACCOUNT-BASED MARKETING

As you can see, it wasn't until recently that ABM really began to catch on, thanks to an increased emphasis on demand generation and ROI — and the huge influx of vendors offering robust ABM solutions. The Google Trends graph below illustrates the interest in the term account-based marketing between January 2012 and January 2017. There's no doubt that 2016 was the year of account-based marketing.



“ ABM has been around for a long time as a B2B marketing approach. ABM is rooted in the basic idea that marketing works better when it starts by focusing on the needs and specific opportunity within a single account or a group of named accounts. This was the original promise of customer relationship management and one-to-one marketing. It's still a great idea.

– MEGAN HEUER, Vice President of Research at SiriusDecisions







**97% of marketers**

achieved higher ROI with ABM than  
with any other marketing initiatives.

– ALTERRA GROUP



# KEY BENEFITS OF ACCOUNT-BASED MARKETING

Now that we've gone over the definition and history of account-based marketing, let's tackle a crucial question:

## What are the benefits of account-based marketing for B2B companies?



### Tightly Aligned Sales and Marketing Teams

According to SiriusDecisions, closely aligned B2B companies grow revenue 19% faster. The first step of account-based marketing requires your sales and marketing teams to identify and agree on key accounts to target. That means both teams must focus on the same goals — in particular, generating revenue from target accounts. Above all, this reinforces the importance of the marketing team's role in the sales process. We'll go into more detail about sales and marketing alignment in [Part Two](#) of this blueprint.



### More Efficient Use of Marketing Budget

With a lead-based strategy, companies spend marketing dollars to acquire as many leads as possible and then qualify them after the fact, effectively throwing away money on leads that are a poor fit. It's far more cost-effective to determine which accounts are the best fit for your products or services before you go after them, and then spend your money reaching them (and **only** them) on the channels where they're active: across the web, on social media, at events, and so on.



### Shorter Sales Cycles

The sales process is notorious for hitting a speed bump when it comes time for prospective customers to get internal buy-in. Account-based marketing solves this problem by getting the right messaging in front of key decision-makers at target accounts, helping to speed up the sales cycle.



# KEY BENEFITS OF ACCOUNT-BASED MARKETING

What are the benefits of account-based marketing for B2B companies?



## Increased Revenue

Using account-based marketing and advertising to reach target accounts sets your sales team up for more successful conversations with their buyers down the line. By the time your sales reps reach out to your target accounts, buyers will have already been exposed to your company's messaging.



## Better Customer Experience

Above all, account-based marketing is about the customer. As a business professional yourself, you know that buyers are not looking for a sales call or a marketing email to kick off their research process. Rather, they want to explore solutions on their own terms and only receive communications from vendors when they're meaningful and relevant. ABM makes it easy to deliver on this need across the entire buyer's journey and customer lifecycle.

## ▼ RECAP

### The Top 5 Benefits of Account-Based Marketing

1. Tightly aligned sales and marketing teams
2. More efficient use of marketing budget
3. Shorter sales cycle
4. Measurable impact on revenue
5. Better customer experience



# BENEFITS OF USING TERMINUS AS PART OF YOUR ABM STRATEGY

One of the biggest challenges of account-based marketing is identifying and reaching the right people at the right companies. Terminus solves this problem by allowing you to expand your reach beyond contacts in your CRM to engage all relevant decision-makers at your target accounts. With Terminus, you can zero in on these key influencers and serve them digital ads wherever they are on the web. Benefits of using Terminus as part of your ABM strategy include:

- ✓ **Best-Fit Account Targeting** – Target your ideal customers, drawing from a database of over 200 million business professionals.
- ✓ **Automated Advertising Campaigns** – Automatically deliver relevant messaging to your target audience based on buyer personas and their stage in the sales cycle.
- ✓ **Multichannel Capabilities** – Deliver your marketing messages across mobile, social, display, and video channels to engage buyers on their own terms.
- ✓ **Easy Implementation** – Get your first Terminus campaign up and running in under 30 minutes.
- ✓ **Salesforce Integration** – Terminus syncs bidirectionally with your Salesforce CRM.
- ✓ **Expanded Reach** – Reach key decision-makers at target accounts even without retargeting cookies or your target buyers' contact information.
- ✓ **Shorter Sales Cycle** – Accelerate deals from first contact to closed-won by engaging all stakeholders at your target accounts.
- ✓ **Higher Win Rates** – Terminus helps improve the efficiency of opportunity creation as well as prospect-to-opportunity conversion rates. As a result, win rates on accounts targeted by Terminus campaigns are significantly higher.
- ✓ **Improved Budget Efficiency** – Spend your advertising dollars only on target accounts. Plus, unlike other ABM vendors, Terminus does not charge margin on media spend.







“ With Terminus, we saw engagement with 60% of our target accounts with an opportunity-to-spend ratio of 100X.

- JIM HOPKINS, Sr. Product Marketing Manager at Salesforce Data.com

[Learn more](#) about Terminus' ABM platform.

Ready to get started with account-based marketing? Read on to learn how your sales and marketing teams can work together to plan, execute, and measure a successful ABM strategy.





# PART TWO

## 7 Steps to Getting Started with Account-Based Marketing



# STEP 1

## ASSEMBLE YOUR ACCOUNT-BASED MARKETING TEAM

In order for your account-based marketing strategy to be successful, it's crucial that both your sales and marketing teams are involved in setting expectations, defining your goals and KPIs, and determining the role ABM will play at your organization.

Before you begin planning your first ABM campaign, you'll need to assemble a core ABM team. The members of this team will vary depending on your organizational needs, but at minimum, it should be made up of team leads from sales, sales development, and marketing.





# STEP 1

## ASSEMBLE YOUR ACCOUNT-BASED MARKETING TEAM

In an ideal world, your account-based marketing team will include the following roles.



### **Business/Sales Development Reps**

Your sales development team will be responsible for working with marketing to execute inbound and outbound ABM efforts.



### **Sales Database Administrator**

This data guru will keep the contact and account data in your CRM accurate and up-to-date.



### **Marketing Operations Manager**

The administrator of your marketing automation platform will be responsible for aligning contacts and accounts with marketing activities based on their stages in the purchase decision.



### **Content Manager**

This storyteller will work with marketing, sales, and customer success to supply collateral for every stage of the account's journey.



### **Graphic Designer**

Your creative lead will collaborate with your content manager to develop all your ABM collateral.



### **Account Executives**

These salespeople will get to know your target accounts inside and out and ultimately be the ones to close the deal.



# STEP 1

## ASSEMBLE YOUR ACCOUNT-BASED MARKETING TEAM



### Sales Leader

Your sales team manager or director will be instrumental in setting goals and developing account-based selling processes.



### Customer Success Managers

Your customer success team knows your customers better than anyone else, and it's their job to help turn your accounts into advocates.



### Executive Stakeholders

The leadership at your organization — including your CMO, VP of sales, and/or CEO — should also have a stake in your account-based marketing strategy.

Of course, many organizations don't have team members to fill all these roles. Don't worry — smaller teams with fewer resources can still succeed with account-based marketing. The important thing is to make sure all key stakeholders are represented on your core ABM team and have a say in your goals and strategies.

“

ABM has created closer alignment between our sales and marketing teams as we collectively work together to a common goal via a commonly agreed upon list of target accounts and shared outreach.

– **JULIA STEAD**, Director of Demand Generation at Invoca



# STEP 2

## DEFINE YOUR GOALS AND STRATEGY

Now that you’ve assembled your core account-based marketing team, it’s time to sit down and define your goals. What do you want to accomplish with ABM? Your goals will inform your strategy, so it’s important that everyone on your core ABM team is on the same page.

Common goals of account-based marketing include:

 Successfully launching a new product	 Executing a competitive takeout	 Building market share in an existing segment	 Getting more value from existing customers	 Entering new markets, verticals, or segments	 Targeting strategic named accounts
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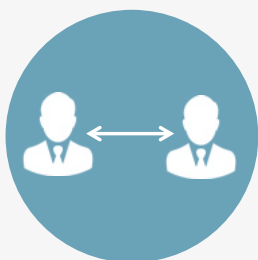


## STEP 2

### DEFINE YOUR GOALS AND STRATEGY

Chances are, your organization is getting started with account-based marketing to accomplish a variety of goals. Depending on your resources and the size of your team, you may initially want to focus on one goal and gradually expand, or you may want to immediately transition to an entirely account-based strategy.

There are four ways to approach ABM:



#### 1:1 ABM

Targeting 1-10 high-value, strategic accounts with personalized messaging



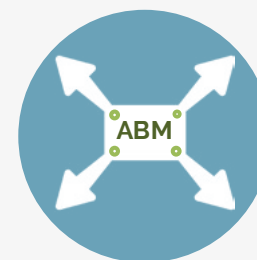
#### ABM Lite

Targeting 10-100 accounts that share similar characteristics, challenges, and initiatives



#### Programmatic ABM

Targeting 100-1000 identified accounts using ABM-inspired tactics



#### Bolt-On ABM

Supplementing lead-based nurturing with account-based advertising to expand reach to include an entire account

As you might guess, 1:1 ABM is by far the most resource-intensive way to do account-based marketing, so it should be reserved for extremely high-value logos. Which approach or approaches your team takes is highly dependent on the goals you've set and the resources you have available.



## STEP 3

### SELECT YOUR TECHNOLOGY

We've got technology to thank for the ABM revolution. Without the growing landscape of ABM software, it would be impossible to do account-based marketing at scale.

That's because:

- ABM technology helps you engage your customers on their terms via digital channels rather than just emails and phone calls.
- ABM technology makes it possible to engage not only an individual lead but also the entire account — even if you don't have their contact information in your database.
- ABM technology is versatile. It allows you to personalize your marketing based on personas, sales stages, campaigns, or activity in your CRM.

With so many account-based marketing tools on the market, how can you pick the ones that work best for your business? The best resources for discovering and comparing ABM technology include:

- **Technology review sites** such as G2 Crowd, Capterra, and TrustRadius
- **The Terminus Cloud for Account-Based Marketing**  
A collection of 40+ ABM tools that align with all the stages of the flipped funnel: Identify, Expand, Engage, Advocate, and Measure
- **The Account-Based Marketing Stack Grader**  
An interactive tool that grades your marketing technology stack, allowing you to identify gaps and overlap in your ABM software



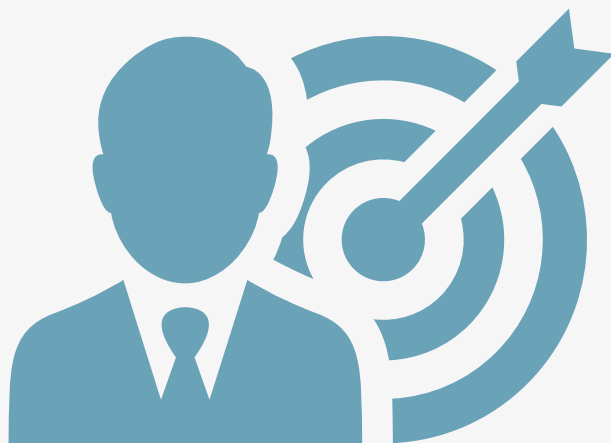
Cloud  
for ABM



## STEP 4

### IDENTIFY AND PRIORITIZE TARGET ACCOUNTS

Once your team has agreed upon your primary reasons for doing ABM and selected the best technology for your goals, you'll need to identify the accounts you want to target. These accounts should fit your ideal customer profile, or ICP. If you don't have a documented ideal customer profile, use the [Defining Your ICP Worksheet](#) to help you and your sales team have a productive conversation about the accounts you should focus on.



If you haven't already, you'll also need to define your buyer personas. While ABM is focused on accounts rather than leads, each account is still made up of individuals with diverse roles and priorities. Use the [Identifying Buyer Personas Worksheet](#) to describe each of your personas in detail.



**TIP:** Set up a monthly smarketing meeting to discuss target accounts so that both teams are always aligned behind the same objectives.





## STEP 4

### IDENTIFY AND PRIORITIZE TARGET ACCOUNTS

Next, it's time for marketing and sales to determine precisely which accounts to go after. To assist in the identification process, you can use any number of ABM technologies — such as predictive tools like Mintigo, Infer, EverString, 6Sense, and Lattice Engines and data tools like Data.com, Oceanos, LeadGenius, Node, and Synthio — to help pinpoint companies that fit your ICP.

**Learn more** about account-based marketing tools that can help you identify your target accounts.

#### Predictive Tools



#### Data Tools



## STEP 5

# SELECT YOUR CHANNELS AND CRAFT YOUR MESSAGING

Account-based marketing is so effective because it allows you to proactively engage best-fit accounts rather than waiting for qualified leads to come to you. Which channels will you use to reach those accounts? You can deploy your account-based marketing campaigns using channels and activities such as:



Email



Direct mail



Social media



Video



Website



Blogs



Display ads



Search engine ads



In-person events



Infographics



Webinars and virtual events



E-books and white papers

Account-based advertising tools like Terminus take the guesswork out of ABM campaigns by reaching your target accounts (and only your target accounts) wherever they are online. You should prioritize the other channels based on which have historically been the highest revenue drivers for your business.

Once you've selected your marketing channels, it's time to create targeted content that will resonate with your audience. You may choose to create marketing assets for different buyer personas, verticals, company sizes, deal sizes, or stages of the sales cycle. Or, you can get even more personal by creating one-to-one messaging for each account.

If you're targeting accounts by their stage of the sales cycle, you can use the [Content Mapping Worksheet](#) to map your existing and future content to each stage of the buyer's and customer's journeys.



**TIP:** Make sure your marketing and sales messaging is consistent across channels. According to McKinsey & Company, the typical B2B customer uses six different channels throughout the decision-making process, and about 65% say they become frustrated by inconsistent brand experiences.



“

Every decision we make about our go-to-market strategy involves stakeholders from both sales and marketing. Both teams must always be involved in every conversation about tools, strategy, content, and messaging.

– TONNI BENNETT, VP of Sales at Terminus





## STEP 6

### EXECUTE CAMPAIGNS AND BEGIN SALES OUTREACH

It's finally time to put your messaging into market! Use your shiny new ABM technology to deploy your digital ads and engage your target accounts across the web, at events, and via direct mail.

Once your message has been in market long enough to make an impression on your target accounts, it's time for your sales reps to begin outreach using more traditional channels like phone calls and emails. At this point, your marketing team will have already used ABM to generate brand awareness and engage decision-makers at your target accounts, setting the stage for more effective sales conversations.

But your job as a marketer isn't over just because sales has started outreach. If you're running display ads using Terminus, make sure you refresh your creative approximately every 45 days to prevent ad fatigue and ensure your audience is getting the most relevant, effective messaging that will move your accounts through the buyer's journey.



# STEP 7

## EVALUATE AND OPTIMIZE

As with any business strategy, you'll need to accurately measure your ABM campaigns and optimize them when necessary. We'll explore exactly which metrics to track and how you can optimize your campaigns in **Part Four**.



Now that you know the seven steps to planning and implementing account-based marketing, it's time to put that knowledge into action. In the next section, we'll explore seven essential ABM strategies and explain how to execute them.

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Explore worksheets to learn more.



ICP Worksheet



Personas Worksheet



Content Mapping  
Worksheet





# PART THREE

## 7 Must-Try Account-Based Marketing Campaigns



By now, you’ve learned the basics of ABM, how it works, and how it can positively impact your business — but understanding the underlying principles of ABM is only half of the battle.

Next, let’s explore which business challenges can be solved using account-based marketing campaigns.

To facilitate this process, we’ve developed the ABM Strategies Framework. This strategic framework will help you select account-based marketing strategies based on your business goals and the level of sophistication of your ABM program.

Use the ABM Strategies Framework (right) to identify must-try campaigns you can execute using account-based marketing and ensure you’re nurturing your target accounts from the time you identify them to the time they become customers — and beyond.

Broadly speaking, the three primary use cases of account-based marketing are demand generation, sales pipeline, and customer marketing. Within these categories, marketers can apply seven essential ABM strategies.



Learn more about the [ABM Strategies Framework](#).



# DEMAND GENERATION STRATEGIES

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**Remember: account-based marketing is not about generating net-new leads.** That being said, ABM is an important part of any demand generation strategy. There are three types of demand gen strategies that can be accomplished with ABM:

- Pretargeting
- Account nurture
- Lead-to-account nurture



“Lead generation is easy and demand generation is hard. The difference in the two is quality and knowing your best-fit accounts to go after.

– SANGRAM VAJRE, CMO and Co-Founder at Terminus, Author of *Account-Based Marketing for Dummies*





## STRATEGY ONE

# Pretargeting

Pretargeting is smarketing at its finest. It's a demand generation strategy designed to complement your outbound efforts. To generate demand and warm up net-new accounts for sales, you can deploy relevant digital ads across social, video, mobile, and display.

By serving targeted ads to stakeholders at your best-fit accounts, you can drive greater engagement — and not just with a single lead, but with all key decision-makers at each company. The biggest benefit of a pretargeting strategy is the ROI. When you place your ads in front of only the people who you want to see them, you avoid wasting money on unqualified accounts. If you're employing a 1:1 ABM strategy, your ads and marketing offers can even be highly personalized to each individual.



**TIP:** Pretargeting is a useful strategy for driving decision-makers to events. Use account-based advertising to generate awareness about the event, and then follow up with a personalized invitation from a sales rep.



## STRATEGY TWO

# Account Nurture

Account nurture campaigns aim to engage key stakeholders at target accounts that you already have in your database and convert them to sales pipeline. Because the B2B sales cycle is long and often complicated, many of the accounts you're marketing to won't immediately be ready to make a purchasing decision. **Don't** make the mistake of letting these accounts go to waste just because they're not going to turn into immediate sales.

Instead, use account-based nurturing to continue to present your messaging and content to those accounts over time, keeping your company top-of-mind until they are ready to convert into a sales opportunity.



### STRATEGY THREE

## Lead-to-Account Nurture

The lead-to-account nurture strategy is unique because it **only applies to bolt-on ABM**. If your goal is to generate demand while dipping your toes in the ABM water, this is the strategy for you. As you use inbound marketing strategies to generate leads, you can “bolt on” account-based marketing by expanding your reach at those leads’ companies. You can do this using digital ads to nurture the entire buying committees.

Lead-to-account nurturing and bolt-on ABM solve one of the basic challenges of lead-based marketing: being unable to reach the entire buying committee within a company. Bolt-on ABM is the fastest way to extend marketing’s reach to all of the influencers and decision-makers in an account while nurturing an individual lead. This type of ABM is easily automated and can be added to existing marketing automation flows.

Note, however, that bolt-on ABM doesn’t provide the same efficiency gains or personalization as the other types of account-based marketing. One of the key benefits of the other types of ABM is that marketing dollars are not wasted on a “spray and pray” approach. Instead, the entire budget is spent on marketing to targeted accounts.

If you already have a successful, high-converting lead generation program, this may be a good place to start with ABM. If you’re not generating lots of high-quality leads, we recommend starting with a pretargeting strategy to target net-new accounts.





“

ABM makes sense now because it's filling the void created by limitations of inbound marketing – that is, it takes a long time to work – and the blanket ineffectiveness of outbound marketing. In between the two, something else had to emerge to help marketers generate near-term results, but results in a compelling and account-friendly way. That's where ABM enters the picture.

– JOE CHERNOV, VP of Marketing at InsightSquared






# PIPELINE VELOCITY STRATEGIES

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Pipeline velocity strategies are an important part of account-based marketing because they help move your best-fit accounts through the sales cycle more quickly. There are two major pipeline velocity strategies that can be executed using ABM:

- Pipeline acceleration
  - Wake the dead
- 

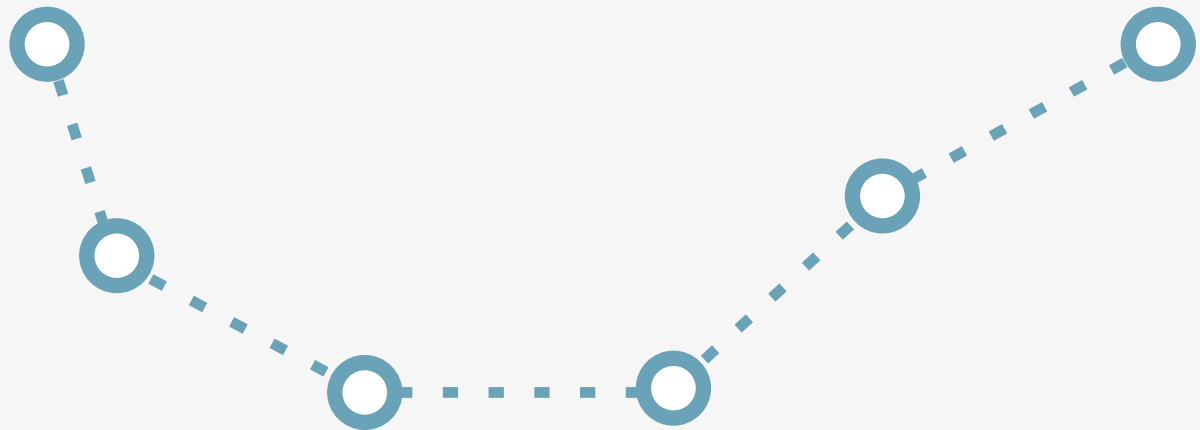


#### STRATEGY FOUR

## Pipeline Acceleration

Pipeline acceleration campaigns support sales efforts to engage more influencers and decision-makers at target accounts and move them to the next positive stage in the buying cycle more quickly. You can do this using digital advertisements, sales rep engagement, field marketing activities, and events to educate and build a relationship with your potential customers through each stage of the buying process.

At many companies, pipeline acceleration is a vastly underutilized strategy. That's because traditional marketing methods — emails in particular — can feel intrusive during the sales process. Not only that, but they're limited to the same contacts that your sales team is working. With an account-based pipeline acceleration strategy, however, you can use tactics like digital ads to reach additional stakeholders, helping to build consensus at your target accounts and move them through the pipeline more quickly.



## STRATEGY FIVE

# Wake the Dead

At any given time, your database is full of “dead” accounts that aren’t actively participating in the sales cycle. But don’t be fooled; these accounts aren’t actually dead! To bring these inactive accounts back to life, you can target them with ABM campaigns to revive their interest.

Not only does this remind your target accounts about your solution, it also allows you to reach additional contacts at each account — contacts that may be more receptive to your messaging and more likely to engage with your brand.

### REAL-WORLD EXAMPLE

“One of the interesting campaigns we run with Terminus is called our dead opps revival campaign. We ran a campaign to target previous dead opportunities — individuals at the accounts that we know, as well as others that we didn’t know yet — to raise awareness across the base. It was a great example of how we can reengage them back into our brand.



Through running a single campaign with Terminus, we were able to revive over 35 different opportunities with those previous dead opps. When you can turn a program on and within 30-60 days generate dozens of new opportunities worth potentially millions of dollars in the sales pipeline, then that’s how we know it’s working.

– TYLER LESSARD, CMO at Vidyard








# CUSTOMER MARKETING STRATEGIES

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Account-based marketing isn't just for winning new business. It's also incredibly effective for retaining your current customers, helping them be successful with your solution, and generating more revenue from your customer base. The two key customer marketing strategies that benefit from an account-based approach are:

- Land and expand
  - Renewal and upsell
- 



### STRATEGY SIX

## Land and Expand

Selling to enterprise accounts can be tricky, especially when they're divided into smaller divisions or subsidiaries that operate independently and often have different points of contact. This is where you'll want to "land and expand."

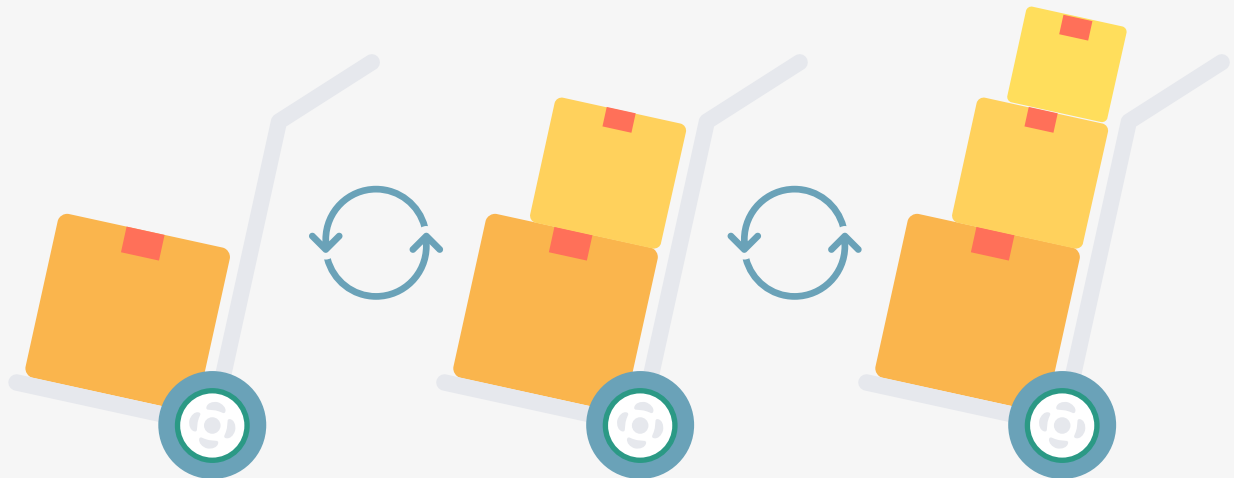
If you've done business with one division of a complex enterprise company and are hoping to expand into others, you can use ABM technology to present ads to those target divisions' key decision-makers. These ads are especially effective when they're hyper-personalized, highlighting case studies and testimonials from your target buyers' coworkers.



### STRATEGY SEVEN

## Renewal and Upsell

The goal of renewal and upsell campaigns is to increase renewal rates and contract values of your current customer base. This campaign strategy requires close collaboration between your marketing, sales, and customer success teams. In order for an account-based renewal and upsell campaign to be successful, you need to combine marketing initiatives like direct mail, email nurtures, and advertising campaigns with personal outreach from your customer success team and/or sales reps.



# HOW TO PLAN YOUR CAMPAIGNS

Ready to try your hand at account-based marketing? Use the [Campaign Creation Worksheet](#) to plan any of these types of ABM campaigns. Then, read [Part Four](#) for more information about optimizing and measuring the success of your campaigns.



“Come to your targets with a solution and a genuine desire to help; show them exactly how your solution will help them and bring relevant use cases to the table.

- EMILY WINGROVE, Director of Marketing at Synthio

Explore worksheets to learn more.



Campaign Creation





# PART FOUR

## How to Measure and Optimize Your ABM Campaigns



# OPTIMIZATION

While many traditional marketing strategies don't allow you to optimize your campaign until it's already run its course, account-based marketing is an agile strategy that's designed to be tweaked and modified throughout any campaign.

In particular, advertising at the account level allows for real-time optimization. You can use ABM technology to see if your advertising creative and marketing messages are falling flat with your target audience and swap them out on the fly. Terminus makes it easy to automate A/B testing to create the most effective ads.

You can also optimize your ads manually. Compare them side-by-side to determine which colors, copy, images, and calls-to-action are generating the most clicks among your target audience.



**TIP:** Always have alternate marketing messaging and creative ready to go in case your ABM campaign isn't hitting its mark.

Another important part of the optimization process is gathering feedback from your sales team, which should happen continuously as you run your ABM campaigns.

Make sure you ask your sales team the following questions.

- Have we been successful in penetrating the key accounts we wanted to target?
- Which messages in market are getting the best feedback from our target accounts?
- Has the quality of your sales calls improved?
- What can the marketing team be doing to better support our goals?

The combination of quantitative data and your sales team's responses can guide you as you update and optimize your campaigns.



# ACCOUNT-BASED MARKETING KPIS

Measuring the success of your account-based marketing campaigns is a lot like measuring the success of any other marketing program, except this time, you're restricting your measurements to key accounts.

Your KPIs will depend on your business goals and the type of campaign you're running. These are the eight most common account-based marketing metrics:

## ✓ Marketing Qualified Accounts

With account-based marketing, you'll shift from marketing qualified leads (MQLs) to marketing qualified accounts (MQAs), which provide a much more comprehensive picture of your prospective customers. In order for an account to be labeled as an MQA, it must fit your ICP and meet a predetermined level of engagement among multiple contacts at that account. Accounts that don't fit each parameter of your ICP shouldn't be disqualified, but they should require a higher level of engagement to be considered MQAs.



**TIP:** If you're taking a tiered approach to ABM — in which you prioritize high-value accounts as Tier 1, medium-value accounts as Tier 2, and so on — the level of necessary engagement will differ by tier. Because Tier 1 accounts are your top priority, they'll need a lower level of engagement to be considered MQAs than Tier 3 accounts. If you're using account grading, on the other hand, you may consider any account with a B+ grade and a specific level of engagement to be qualified.



## Engagement Rate

Are your target accounts engaging with you? Look at whether accounts are clicking on ads, have a high velocity score, or are visiting your website. With ABM, you should focus on increasing engagement with the entire account — not just a single lead. You can also look at the account's score within your marketing automation platform to determine engagement levels.



## Reach Within an Account

How many net-new contacts did you reach with your ABM campaign? This metric is a great indicator of brand awareness. At a macro level, it also can give you insight into the size of your typical customer's buying committee and help you target your marketing more effectively.



# ACCOUNT-BASED MARKETING KPIs

## ✓ Pipeline Velocity

Did your account-based marketing campaign move accounts through your sales process faster and ultimately close deals faster? What is the timeline of stage progression from first touch to opportunity? How about from opportunity to closed-won deal?

## ✓ Conversion Rates Throughout the Funnel

Did your ABM campaign increase the number of target accounts that progressed to the next positive stage in your sales cycle? This metric can be measured by many different parameters depending on the stage of the sales process and your business goals, but some common goals to track include meetings set, opportunities created, and target accounts converted to customers.

## ✓ ROI

What is the return on your investment for each account-based marketing campaign? It's important to note that the ROI will not be immediate because ABM is a long-term business strategy and not a quick fix.

## ✓ Marketing Influence

Since B2B sales are typically complex with multiple touchpoints and long sales cycles, there is rarely one tactic or touchpoint that is responsible for an opportunity being created or a deal being closed. Because of this, it's important to understand which deals marketing influenced and where in the sales process the influence occurred. By comparing that data to deals that were not influenced by marketing touches, you'll be able to measure marketing's influence on pipeline, ROI, and the sales process overall.

## ✓ Churn Rate

What percentage of customers that are being targeted by an ABM campaign churn? Is this number lower than your overall churn rate?

## ✓ RECAP: 8 Account-Based Marketing KPIs

1. Marketing qualified accounts (MQAs)
2. Engagement rate
3. Reach within an account
4. Pipeline velocity
5. Conversion rates throughout the funnel
6. ROI
7. Marketing influence
8. Churn rate





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Account-based marketing is powerful due to its ability to promote to specific companies instead of wasting time and budget on unqualified or undesirable prospects. Seriously, how often do people request a white paper or attend a webinar, even though there is no way they are ever going to buy the product or service?

– JAY BAER, President at Convince & Convert



# METRICS THAT DON'T MATTER

Traditional lead-based goals and metrics do not directly apply to ABM. Remember, your goal is to speak the same language as your sales team — and that language does not include the word *lead* because it's all about the account!

Let's take a look at some metrics that should **not** be used to track the success of your account-based marketing campaigns.



That's not to say these metrics don't matter at all. While these numbers are still indicators of engagement and shouldn't be disregarded completely, they should not be considered success metrics in most ABM campaigns.

Using account-focused KPIs to track success — and optimizing based on your results — will help you build the most impactful ABM campaigns and demonstrate ROI for your organization.





## > CONCLUSION

Account-based marketing is a modern take on classic B2B strategies, bolstered by new technology and a commitment to sales and marketing alignment. It starts with flipping the B2B funnel as we know it, then identifying and targeting best-fit accounts to turn them into customers and advocates.

The worksheets, checklists, and tactical advice in this blueprint are a comprehensive jumping-off point for any B2B marketer looking to implement an ABM strategy or enhance their current strategy.

To learn more about how Terminus and account-based marketing would benefit your company, [schedule a demo with our team.](#)

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The point to all of this is that we must rethink the B2B marketing state of mind. An account-based marketing approach requires an intentional shift in thinking. ABM is a state of mind, not a tactic or set of tools.

Welcome to having your mind blown by account-based marketing.



– SANGRAM VAJRE

CMO and Co-founder at Terminus,  
Author of *Account-Based Marketing for Dummies*



# WORKSHEETS





# DEFINING YOUR IDEAL CUSTOMER PROFILE



To define your ideal customer profile (ICP), have your sales, marketing, and customer success teams sit down and review what makes a company successful with your product or service.

## Part 1: Named Accounts

Create a list of customers that have been exceptionally successful with your solution.


In a perfect world, which companies would you like to turn into customers?




# DEFINING YOUR IDEAL CUSTOMER PROFILE



## Part 2: Characteristics of Your Ideal Customers

Look at the customers and target accounts you named above. What characteristics do they have in common that make them a good fit?

Industries/verticals	
Size	Geography
Budget	Annual revenue

### Other Factors to Consider

- Technology they use
- Number of employees in a particular department
- Size of their customer base
- Level of technology maturity

### NOTES



# DEFINING YOUR IDEAL CUSTOMER PROFILE



## Part 3: Define Your ICP

Now it's time to put all this information together and define your ideal customer profile.

**Example:** Our ideal client is a B2B SaaS company in the U.S. or Canada that has a customer service team of at least 10 people and ARR of at least \$20 million. Their customer base is made up of small and medium businesses that require significant hands-on training and support.

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# IDENTIFYING BUYER PERSONAS



Use this worksheet to identify your buyer personas: the people your sales and marketing teams engage with directly during the sales process. You'll need to define the job description, role, and responsibilities of each contact you want to target within your ideal customer profile as well as challenges they face and how your product or service will help solve those challenges.

Because most B2B purchases are made by a buying committee, make sure you fill out this worksheet for each of your buyer personas.

<b>Job title</b>	
<b>Reports to</b>	
<b>Role in the purchase decision (select all that apply)</b>	<input type="checkbox"/> End user <input type="checkbox"/> Key influencer <input type="checkbox"/> Decision-maker <input type="checkbox"/> Buyer <input type="checkbox"/> Other: _____
<b>Objectives &amp; goals</b>	1. _____ 2. _____ 3. _____ 4. _____ 5. _____





# IDENTIFYING BUYER PERSONAS



<b>KPIs</b>	<ol style="list-style-type: none"><li>1. _____</li><li>2. _____</li><li>3. _____</li><li>4. _____</li><li>5. _____</li></ol>
<b>Pain points &amp; challenges</b>	<ol style="list-style-type: none"><li>1. _____</li><li>2. _____</li><li>3. _____</li><li>4. _____</li><li>5. _____</li></ol>
<b>Relevant value proposition &amp; messaging</b>	<ol style="list-style-type: none"><li>1. _____</li><li>2. _____</li><li>3. _____</li><li>4. _____</li><li>5. _____</li></ol>



# IDENTIFYING BUYER PERSONAS



Common objections	<div>1. _____</div> <div>2. _____</div> <div>3. _____</div> <div>4. _____</div> <div>5. _____</div>
Talking points	<div>1. _____</div> <div>2. _____</div> <div>3. _____</div> <div>4. _____</div> <div>5. _____</div>



# CONTENT MAPPING



	Buyer's Journey		
	Demand Generation	Pipeline Velocity	
Stage	Prospect	Opportunity	Customer
Goal	Lead to qualified account	MQL/MQA to Opportunity	Opportunity to customer
Content	<b>Blog posts:</b> 1. _____ 2. _____ 3. _____  <b>E-books/white papers:</b> 1. _____ 2. _____ 3. _____	<b>Webinars:</b> 1. _____ 2. _____ 3. _____  <b>Video testimonials:</b> Customer: _____ Customer: _____ Customer: _____  <b>Customer case studies:</b> Pain point: _____ Case study: _____  Pain point: _____ Case study: _____  Pain point: _____ Case study: _____	<input type="checkbox"/> Video testimonials <input type="checkbox"/> Customer case studies <input type="checkbox"/> Competitive analysis  <b>"How-to" resources:</b> 1. _____ 2. _____ 3. _____  <b>Proof of ROI:</b> <input type="checkbox"/> ROI calculator <input type="checkbox"/> Aggregate customer data <input type="checkbox"/> Industry data <input type="checkbox"/> Case studies



# CONTENT MAPPING



	Customer's Journey			
Stage	Adoption	Cross-Sell/Upsell	Land & Expand	"Always On" Air Cover
Goal	Customer to advocate	Winning new business	Winning more business	Keeping top-of-mind
Content	<input type="checkbox"/> Implementation guide  <input type="checkbox"/> Tutorials  <input type="checkbox"/> Knowledge base  <b>How-to resources:</b> 1. _____ 2. _____ 3. _____	<input type="checkbox"/> Product webinar  <input type="checkbox"/> Video testimonials  <input type="checkbox"/> Customer case studies  <input type="checkbox"/> Proof of ROI	<input type="checkbox"/> Video testimonials  <input type="checkbox"/> Customer case studies  <input type="checkbox"/> Proof of ROI	<input type="checkbox"/> Quarterly reports  <input type="checkbox"/> Newsletter  <b>Thought leadership themes:</b> 1. _____ 2. _____ 3. _____





# ACCOUNT-BASED MARKETING CAMPAIGN CREATION



Campaign Name \_\_\_\_\_

## Campaign Goal

What is the primary goal of your campaign?  
Remember: this is a general goal.  
We'll get into metrics later on.

- ☐ Turn leads into qualified accounts
- ☐ Win new business through upselling or cross-selling
- ☐ Turn MQAs into opportunities
- ☐ Win more business from enterprise customers
- ☐ Turn opportunities into customers
- ☐ Stay top-of-mind
- ☐ Turn customers into advocates
- ☐ Other: \_\_\_\_\_

## Target Audience

Who will you be targeting with this campaign? Use one or more of the following categories to segment your audience for the most effective campaign.

### Stage of the Sales Cycle

- ☐ Prospect ☐ MQA ☐ SQA ☐ Opportunity ☐ Customer

### Buyer Personas

_____	_____	_____
_____	_____	_____

### Industries

_____	_____	_____
_____	_____	_____

### Named Accounts

_____	_____	_____
_____	_____	_____



# ACCOUNT-BASED MARKETING CAMPAIGN CREATION



## Messaging and Creative

What is the message you want your audience to take away from this campaign? Consider A/B testing two messages to determine which content and creative are the most effective for your desired outcome.

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## Distribution Channels

Note that you can supplement these with additional channels such as your blog and organic social media, but your primary focus should be on channels that allow you to zero in on your target accounts.

- |   |  |
|---|--|
| <input type="checkbox"/> Marketing emails | <input type="checkbox"/> Display ads                 |
| <input type="checkbox"/> Sales emails     | <input type="checkbox"/> Search engine ads           |
| <input type="checkbox"/> Sales calls      | <input type="checkbox"/> Terminus ads                |
| <input type="checkbox"/> Direct mail      | <input type="checkbox"/> In-person events            |
| <input type="checkbox"/> Social media ads | <input type="checkbox"/> Virtual events and webinars |
| <input type="checkbox"/> Video ads        | <input type="checkbox"/> Personalized 1:1 videos     |

## KPIs

Select the KPIs that accurately reflect the goals of your campaign.  
Check all that apply.

- |  |   |
|--|---|
| <input type="checkbox"/> Impressions                         | <input type="checkbox"/> Sales velocity               |
| <input type="checkbox"/> Site traffic                        | <input type="checkbox"/> Marketing-sourced pipeline   |
| <input type="checkbox"/> Marketing qualified accounts (MQAs) | <input type="checkbox"/> Closed-won deals             |
| <input type="checkbox"/> Appointments and demos              | <input type="checkbox"/> Average contract value (ACV) |
| <input type="checkbox"/> Opportunities                       | <input type="checkbox"/> Product usage                |
| <input type="checkbox"/> Engagement within accounts          | <input type="checkbox"/> Customer retention           |
| <input type="checkbox"/> Pipeline velocity                   | <input type="checkbox"/> Customer churn               |
|  | <input type="checkbox"/> Other _____                  |





To learn more about account-based marketing visit:  
**[terminus.com](https://terminus.com)**