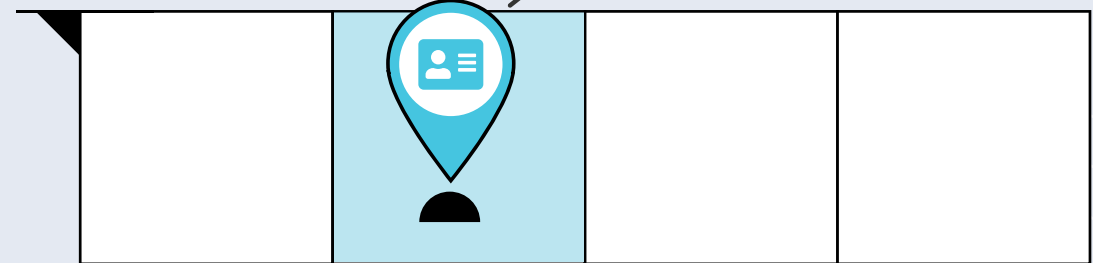


# The ABM Readiness Assessment

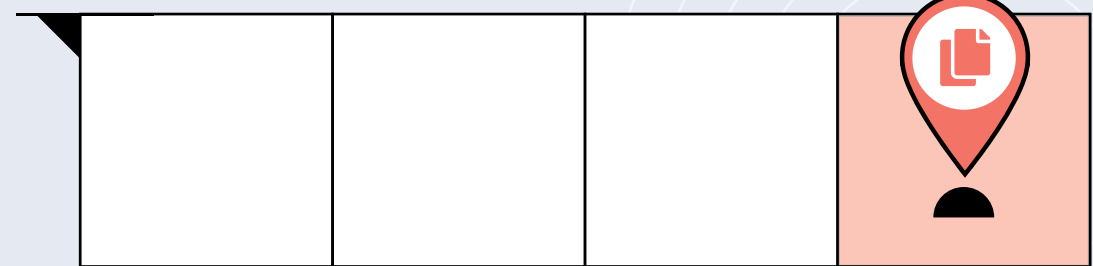
See where you rank and how to uplevel



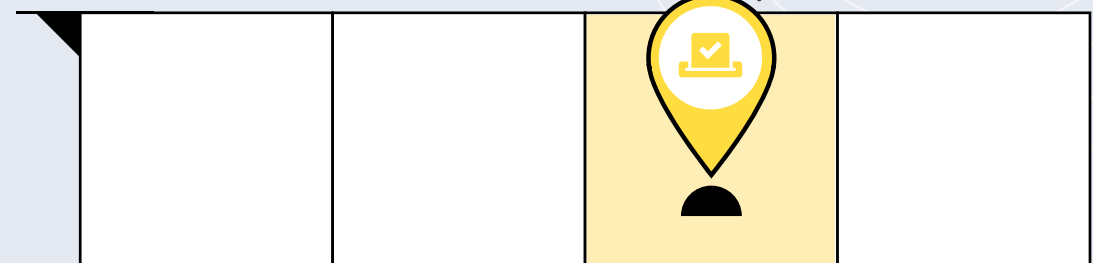
TARGET ACCOUNTS



RESOURCES



EXECUTION



MEASUREMENT



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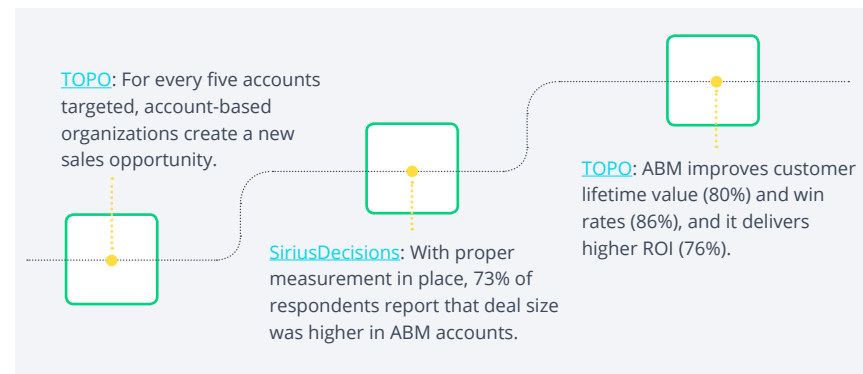
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# Intro

At this point, you've seen plenty of content addressing account-based marketing (ABM) in blanket terms. Tips for gaining alignment across sales and marketing teams, establishing leadership involvement, and selecting target accounts, as well as other niche bits of wisdom, abound. However, your company and marketing team are unique in their structure, resource allocation, current marketing channels used, and ways of measuring success—rendering one-size-fits-all advice less impactful for you as a marketer.

Most ABM “playbooks” are one-dimensional, which makes it difficult to apply their recommendations to your unique business. **We partnered with TOPO, a research and advisory firm that helps sales, marketing, and sales development teams grow revenues faster, to create a framework that is relevant to every B2B marketer.** The output of this framework provides not just a picture of where your ABM program stands today but also actionable steps you can take to make it to the next level.

ABM has made its way into the hearts, minds, and newsfeeds of today's top marketers. And there's a reason: it works. But we'll let the research do the talking:



While the facts show that ABM works, it does work differently for everyone. How are people tactically running ABM day in and day out? If you're like many marketers we've met, ABM may be another layer added to your day-to-day job that feels new or potentially a bit intimidating.

The good news is that even if you're just getting started with your program, you're probably a better account-based marketer than you think. Many of the channels and tactics you use on a daily basis to drive demand are applicable (and critical) within an account-based program; you just need to use them in a more targeted way. And if you've already been running ABM programs for a few years, we have the insights you need to take your program to the next level and ensure continued success.

## The four essential elements of ABM readiness

**What is ABM readiness?** ABM readiness, also called account-based readiness, is a spectrum we've developed alongside TOPO to help marketers understand how precise and robust their current account-based programs are. While there are many elements to your account-based strategy, TOPO's research and our hands-on customer experience point to only four categories that really matter: target accounts, resources, execution, and measurement. Depending on where you fall in each category, you can then assign yourself an overall level of account-based readiness: **Exploring, Developing, Optimizing, or Market-Leading.** From here, this guide will help you assess your current programs and discover information you need to take your strategy to the next level.

At RollWorks, we believe that account-based marketing is just good B2B marketing. We see no need to overcomplicate a strategy that in many ways has been around for years. Our ultimate goal is to turn your most prized target accounts into your best customers yet. We'll show you how you can run a best-in-class ABM program worthy of your team's applause—establishing you as the ABM expert. Let's get started with a quick assessment, and in little to no time, you'll be ready to take the lead.

1. Exploring
2. Developing
3. Optimizing
4. Market-Leading

## Assessing your account-based readiness

### STEP 1

You'll assess your account-based readiness across four key elements: Target Accounts, Resources, Execution, and Measurement.

To start, take a look at the statements in the Target Accounts row. Circle the box that resonates most with your current account-based approach. Repeat this for each element until your assessment is filled out.



★  
EXPLORING

★★  
DEVELOPING

★★★  
OPTIMIZING

★★★★★  
MARKET-LEADING

#### TARGET ACCOUNTS



I'm developing an ICP.

I'm refining an ICP.

I have a tiered target account list.

I have a target account list rotation.

#### RESOURCES



I'm running a pilot and starting to build a team with a % of our demand gen budget.

I have buy-in and a dedicated budget for ABM.

I have an established feedback loop and a dedicated budget.

I'm scaling across segments with a significant budget and executive buy-in.

#### EXECUTION



My marketing campaigns provide air cover for our sales team.

My marketing and SDR teams are running orchestrated plays.

My marketing, SDR, and sales teams are running well-orchestrated plays.

My account-based teams are running velocity and expansion sales plays.

#### MEASUREMENT



I'm measuring campaign performance and MQLs within our ICP.

I'm measuring account-based engagement within our ICP.

I'm measuring campaign influence on target account pipeline.

I'm measuring campaign influence with an account engagement score model.

## STEP 2

From here, determine your overall ABM readiness. To do that, see which ABM readiness column you landed in most.

For example, the assessment below would represent a team at the Developing level of account-based readiness.

★	★★	★★★	★★★★
	💡		
		💡	
	💡		
	💡		

If your responses don't align with one level, that's okay (see below). All that means is that you're somewhere in between two levels. We've designed this guide so that you can uplevel your ABM readiness no matter what your assessment is.

★	★★	★★★	★★★★
			💡
	💡		
		💡	
💡			

★	★★	★★★	★★★★
		💡	
		💡	
	💡		
💡			

## STEP 3

Then, click the links below to read the chapter that corresponds to each box you circled. Each chapter will explain where you are and how to get to the next level.

(Click the link that reflects your ranking.)



### Where did you land for Target Accounts?

[Exploring](#)

[Developing](#)

[Optimizing](#)

[Market-Leading](#)



### Where did you land for Resources?

[Exploring](#)

[Developing](#)

[Optimizing](#)

[Market-Leading](#)



### Where did you land for Execution?

[Exploring](#)

[Developing](#)

[Optimizing](#)

[Market-Leading](#)



### Where did you land for Measurement?

[Exploring](#)

[Developing](#)

[Optimizing](#)

[Market-Leading](#)

## Chapter 1

# Identifying the Right Target Accounts

All marketers must find the right accounts to target before they can run a highly personalized, segmented ABM program. Whether you are trying to identify the right accounts to target or have a fully developed target account list (TAL) that you're looking to tier and rotate, there's something you can do today to make your program more successful.



Since reaching the right target accounts can make or break your account-based programs, we've made this chapter a bit more dense than the others. After all, you're putting your resources against these target audiences, so you'll want your accounts to be as robust and precise as possible.

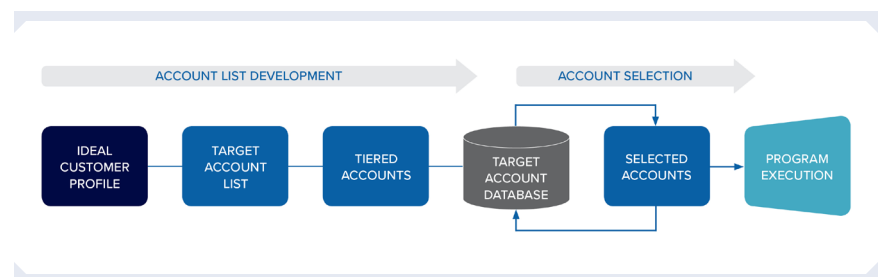
## Where are you starting?

Take a minute to remember where you fell on the account-based readiness spectrum for target accounts. Look at the column you circled, and take extra time to carefully read the corresponding section.

★ EXPLORING	★★ DEVELOPING	★★★ OPTIMIZING	★★★★ MARKET-LEADING
I'm developing an ICP.	I'm refining an ICP.	I have a tiered target account list.	I have a target account list rotation.

Get ready for tips and tricks that will help you progress on your target account list to strengthen it. If you're an extra-ambitious marketer, we suggest you take a peek at each level to make sure you know the ins and outs of refining a target audience.

Here's a snapshot of all the steps to build a strong target account list:



*Account Selection, TOPO 2019*

## Exploring and developing

If you haven't reached the point of building your target account list based on an ideal customer profile (ICP), data model, or predictive analytics, you're not alone. Most marketers create segments according to company size, such as SMB, mid-market, and enterprise, and they often incorporate specific industries to target. While this is a great place to start, the result is often a very large list of companies, which makes it difficult to prioritize and focus on the best companies and opportunities.

The critical first step is aligning on the detailed criteria that can be used to determine top accounts. One of the most common ways companies accomplish this is by creating a shared definition of an ICP.

Let's dig into why starting with an ideal customer profile is one of the best ways to create a winning target account list. From there, we'll guide you through setting up your own target account lists.

### What's an ideal customer profile?



Before starting, it's important to understand what an ICP isn't. Despite some confusion in the ABM world, it isn't your total addressable market (TAM), target account list (TAL), individual buyer or buyer persona, or—above all—just any company that might want your product.



Instead, it's the persona of an enterprise that's an ideal fit for your product. That enterprise persona provides the strategic framework to manage resource allocation and activity across the entire business.



In its most basic form, an ICP defines the firmographic, technographic, and behavioral attributes of the accounts that are expected to become a company's most valuable customers. You'll develop this through both qualitative and quantitative analyses, and possibly some predictive analytics. Your ICP ultimately drives target account list creation, segmentation, organizational structure, and other key tactics.

According to the TOPO [2019 Account-Based Benchmark Executive Summary](#), more than 80% of the most successful account-based organizations say they have a strong ICP. Only 42% of the other companies say they do. Not to mention, organizations with a strong ICP also reported 68% higher win rates. Simply put, a lot rests on your ICP.

### How to build your ideal customer profile

#### 1 Ensure that your audience represents your highest-potential customers.

Before you can begin analyzing your best customers, you need to make sure you have the data required to build a validated ICP. Depending on your organization's maturity and level of historical sales data, this will likely be a combination of quantitative and qualitative data.

This can look like pulling data from your sales funnel, website visitors, customer calls, net promoter score (NPS), financial data, or business intelligence teams. For most organizations, sales funnel data is a great place to begin developing an ICP.

At this stage, you can start conversations with your internal business operations, sales operations, or business intelligence teams to access the data you'll need. Alternatively, you can look to an ABM platform to fill in the gaps if need be.



## 2 Source firmographic and technographic data for this set of companies.

You'll also want to gather firmographic and technographic data from your current customers. Here's the information to start pulling:

**Firmographics** are descriptive attributes of companies that can be used to aggregate individual organizations into meaningful market segments. Essentially, firmographics are to businesses and organizations what demographics are to people. Here are some examples:

- Industry (e.g., investment banking, financial services, accounting)
- Geography (e.g., US, Canada, UK, Ireland)
- Company size (e.g., 500–5,000 employees)
- Revenue (e.g., ≥\$10 million)

**Technographics** are the set of attributes, including contract lengths and other details, that give insight into a customer's tech stack. Here are some examples:

- Marketing automation platform
- CRM
- Direct mail vendor
- Website hosting vendor

One of the greatest takeaways from pulling technographic data is its ability to inform your competitive strategy. If you can find out who your competitors' customers are and what companies are using complementary tech solutions, you'll be better able to reach your audience with the right messaging. For example, if you have an integration with a tech solution your customer is using, you will be in a better position to sell your value proposition.

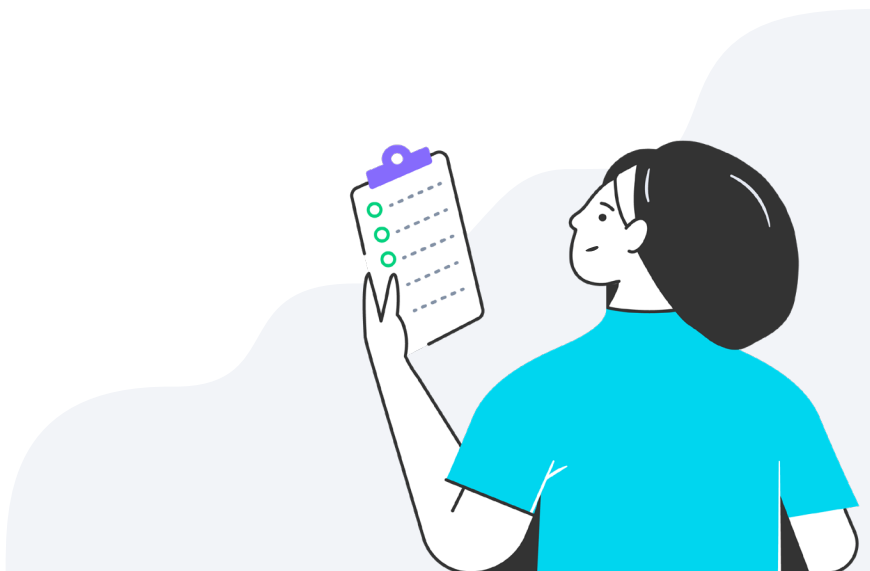
## 3 Isolate top patterns and define your ICP.

Now that you've organized your sales funnel data based on firmographic and technographic attributes, you'll have a clearer picture of your ICP. You'll want to begin identifying patterns to see if you have any sweet spots that prove most successful.

Based on the data you've compiled, here are some questions you might ask:

- When looking at closed-won accounts, is there a certain company size or industry that is most prevalent? Does it surprise you in any way?
- Are certain technologies used most often by these companies? Does your product complement or compete with these technologies?

If there are no clear patterns, you may want to find an ABM partner who can do a deeper analysis for you.



## How this helps you advance your ABM

Armed with an ICP, you have a few options for how to move forward. From here, many marketing teams choose to partner with sales to create a set list of target accounts to pursue. We'll cover those strategies in more depth in the following sections. For marketers who are still running with a pilot or don't want to structure their program around a set list, an ICP can help them get off the ground with a variety of engagement tactics. We'll cover more about how to use an ICP in our chapter about execution, so sit tight for best practices.

### Where an account-based platform can help:

- Identifying your ICP
- Building a strong target account list, including those already in your CRM + net new
- Surfacing key contacts within your target accounts



## Optimizing

After building a robust ICP, many marketing teams work with sales to create a set TAL. Beyond that, in order to manage marketing resources against the right accounts, they start to rank characteristics based on value and accessibility. This section will get you ready to optimize your target account strategy by not only building your TAL but also tiering it.

### Building your target account list

If you're already a few steps ahead and our ICP recap was old news to you, we'll guide you through some expert tips for building your TAL. And for those of you who have used our tips to build your ICP and come back to get to work on a TAL, you'll find what you need here.

The bottom line? Generating a list is pretty simple if you rely on the right data and put in the early work of building your ICP. The first step

for many is to begin pulling a target account list from existing CRM data, but this too-often assumes that the outputs are reliable. While this could be the case, it's helpful to validate your list using a B2B data vendor or ABM platform to ensure that it's accurate. As long as your CRM doesn't include every account that might be a great fit, this will give you the potential to create an even more robust set of targets.

We learned this lesson here at RollWorks when we pulled an original list from our CRM and realized there were gaps in the number of accounts we could go after. By using a database, we were able to discover a more extensive list of right-fit accounts.

Once you've finessed your data outputs and compiled a list of companies that are the right fit, you may feel like the work is done. While it is a big win to have a set target account list, you'll start to realize that not all accounts on your list are created equal. Without full confidence in the value of your TAL, it's difficult to justify increasing the investment for your target accounts.

### The question of buy-in

While it may feel like a win to finally have an account list in your hands, it takes a group rallying around it to really make it successful. Work to develop a cross-functional group that seeks to gain agreement across the entire organization. Call on leaders across sales, marketing, and operations to vouch for a first-time TAL and evangelize it.

## The question of account list size

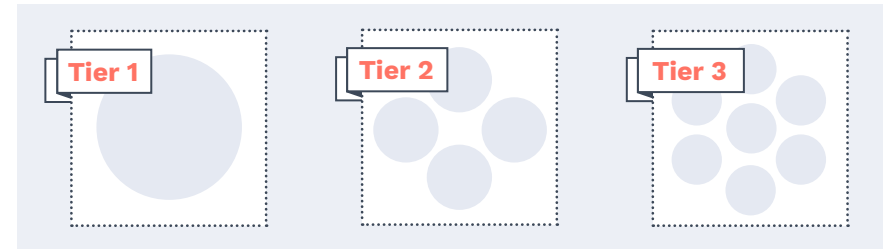
One of the top questions that arises around building a TAL comes as no surprise: how many accounts do I need? While this answer offers little immediate gratification, the truth is that it depends. Based on your resources and goals, the number may range from under 1,000 to over 5,000. A good way to get started on building your list is to consider the size of your sales team and the number of sales development reps (SDRs) and account executives (AEs) available to work their assigned accounts. This will be up to your discretion, but if you think an AE could manage 50 accounts per quarter, and you have 30 AEs, that means your TAL could include 6,000 accounts for the year.

While it's important to make sure both marketing and sales agree on the nature and number of target accounts, it is more critical to align on the detailed criteria that can be used to identify the best accounts and then prioritize (or tier) them. Without this level of alignment and deeper analysis, it can be challenging to have confidence in the list and know exactly where to focus limited resources.

## How to start tiering

This is where tiering comes in. You'll want to evaluate the attributes of the companies on your target account list and begin categorizing them based on a variety of factors. Each tier represents higher value to the organization, and thus merits greater investment, than the one below it. Resources, both internal and for program execution, must be aligned against each tier. A good rule of thumb is to target a 2x-to-5x difference in resources per account by tier to meaningfully differentiate them.

Certain resources and activities become available to lower-tier accounts only when superior alternatives for the higher-tier accounts are discarded. If you have three tiers of target accounts, you'll allocate different resources and tactics to the accounts in each tier. Tier 3 accounts, in this example, might see increased marketing nurture when marketing nurture for Tier 1 accounts is abandoned and replaced with personalized communication from the assigned SDR.



## Build out the buying committee

To further advance your account-based strategies, you can begin sourcing contact information for those in the buying committees at your target accounts. After all, [it takes 6.8 people to reach a purchase decision](#) for B2B sales. Whether you have your sales team source this data on their own or partner with an ABM vendor, finding the right people to get in front of can make your ABM campaigns far more successful.

## Market-leading

Congrats! Many organizations struggle to build and tier a quality target account list that both sales and marketing teams agree on, which is—by far—one of the most critical aspects of account-based success. Once you’ve done this, you’re ready to build an account-rotation plan and program-flighting schedule to align teams around a 6- to 12-month plan.

### Account rotation

In order to optimize program success, your team should begin to establish a specific plan for rotating through the target account list and developing more custom programs for segments of accounts. This helps provide the organization with visibility into how the target account list will be pursued.

The following widely used selection criteria cut across account tiers:

- Industry
- Competitive or complementary technology
- Use case
- Predictive (fit) scores
- Business seasonality

Here’s an example of what a rotation plan may look like when you get to this stage:

JAN	FEB	MAR	APR	MAY	JUNE
Finance Wave 1	Competitor A	Heathcare Wave 1	Retail Wave 1	Use Case A	Use Case B

← TRIGGERED ACCOUNTS →

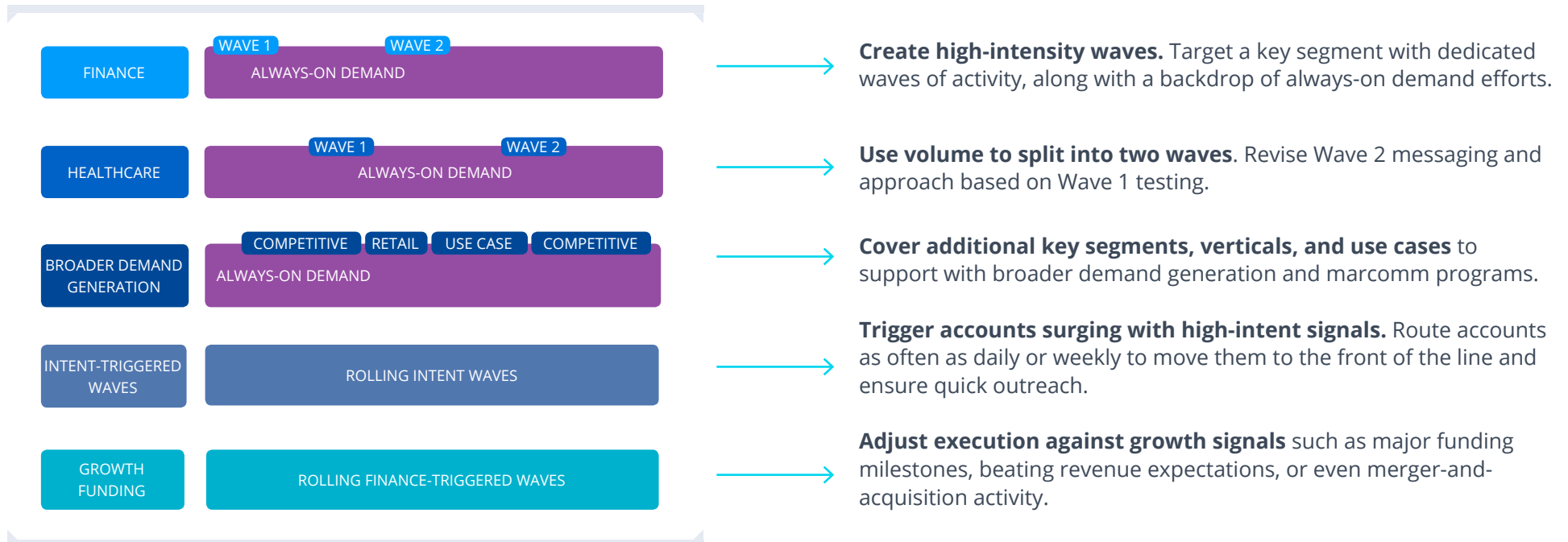
JULY	AUG	SEPT	OCT	NOV	DEC
Finance Wave 2	Competitor B	Heathcare Wave 2	Retail Wave 2	Competitor C	Use Case C

← TRIGGERED ACCOUNTS →

## Program-fighting schedule

Your account-rotation plan runs against a backdrop of broader demand generation and other marketing activity. This combination maintains presence and enables high-impact, focused outreach while limiting wear-out. Multiple waves are used for large segments to align to organizational capacity and allow for intentional periods of higher- or lower-volume outreach by cross-functional teams.

Here is an example of a program-fighting schedule:



*Program-Fighting Schedule, TOPO 2019*

## What's next?

While establishing your target account list can feel like a done deal, the truth is that you need to evaluate the strength of your list over time; it isn't meant to be static forever. Make sure that you establish an agreed-upon cadence with sales to determine which accounts should stay, which should go, and which may need some adjustments. This will set you up for scalable success and ensure that you're primed for improvements over time.

## Chapter 2

# Allocating Resources to ABM

Building a successful ABM program that moves the needle for your business requires more than just a few marketers looking to make an impact. Instead, you will have to make a case for the resources needed to execute on your vision.

What this really comes down to is getting the budget and head count you'll need to run targeted campaigns against your newly developed or refined ICP or target account list. Here's how B2B companies are planning for ABM:

- ▶ [ITSMA](#): 82% of companies plan to skill up for ABM by training existing marketers.
- ▶ [TOPO](#): Account-based budgets are rapidly expanding, with companies increasing spend by 41% in 2019.

And according to SiriusDecisions's [The State of the Account-Based Revenue Engine 2019](#) report, here's the average breakdown of ABM budgets:

\$350K	\$200K	\$620K
Average ABM budget, excluding head count	Average budget for those in ABM pilots	Average budget for those running full programs
Over half of overall ABM budget spent on program development	Most budget put toward media spend, events, content, and insights	

If you don't provide the funds, staffing, and other resources necessary for successful ABM, it will not produce the results that big statistics promise. You must take an honest look at the money and people dedicated to it in order to set expectations with leadership (and yourself).

Under-resourced account-based marketing teams often run into these common problems:

- Marketers end up taking on account-based on top of their other responsibilities.
- It's difficult to create account-based programs that deliver real value to the buyer and enable your sales team.
- Initial programs miss internal expectations, hurting credibility.

But don't worry! We can make sure you have the right strategy at each stage of your journey so that you not only turn (and keep) the lights on but get the attention you deserve for building a well-thought-out ABM program that truly scales.

Before we start figuring out your next steps, let's take a minute to see where you fall on the original matrix for resources.

★ EXPLORING	★★ DEVELOPING	★★★ OPTIMIZING	★★★★★ MARKET-LEADING
I'm running a pilot and starting to build a team with our demand-gen budget.	I have buy-in and a dedicated budget for ABM.	I have an established feedback loop and a dedicated budget.	I'm scaling across segments with a significant budget and executive buy-in.

Depending on where you land, you'll likely need a combination of the following pieces of advice to advance your current strategy. These sections build upon one another, so you can always start with the Exploring and Developing section to get the full view.

## Exploring and Developing

Like most marketers, you may find that it can be difficult to get the entire organization to allocate a dedicated budget or team for ABM. Starting with a pilot program is a strategic way to test the impact of ABM and gather the information you'll need to get more buy-in for programs. According to SiriusDecisions, [while 42% of companies have been running a full program for over one year, 58% are still in a pilot phase](#). When it comes to budget, start by advocating for a percentage of the demand generation budget to test and provide air cover for the sales team based on your ICP.

Resources are always finite, and marketing budgets are dispersed across all functions and activities. To thoughtfully allocate your resources, you'll need to get creative. Things like reworking existing content (e.g., by making it industry focused), reusing components from existing assets or templates, and leveraging technology are all ways to make account-based programs more efficient and effective.

## Keep it simple

While more resources would be nice, account-based marketing doesn't have to be complicated. For those in the early stages, Craig Rosenberg, TOPO's chief analyst, offers the following advice:

"You can make it as simple as focusing in on a subset of your target accounts and letting marketing provide some digital air cover and partner with sales development to go after the accounts together, using a solid message that incorporates relevant stories."



## Build your account-based tribe

Begin building the internal team of stakeholders who support taking an account-based approach. Gather a mix of people across functions (e.g., sales, marketing, and operations) and at various levels of the organization (e.g., executive sponsors, front-line managers, and individual contributors).

If you've been running a pilot, start to collect leadership sponsors who will later be your advocates for allocating more ABM resources. To continue selling the concept of ABM, schedule regular check-ins to share progress around specific metrics and learnings. This will create the foundation you need to build future alignment with the business's long-term goals.

## Meet with sales often

Front-line sales executives, account managers, SDRs, and sales engineers are all important stakeholders. Marketers can learn a lot from those who speak with customers every day, and since B2B marketers don't typically close big deals directly, you need sales to be bought in on the value of your ABM campaigns. Collect insights about the questions they're being asked and the problems they're trying to solve, and incorporate that information into the content and touchpoints for your program.

## Optimizing

In this stage, you'll likely begin to have more leadership buy-in and therefore more budget and resources, which will require you to expand your reach for team-wide support. While this can feel overwhelming for even the best marketer, we have a few frameworks that will help you navigate building an account-based leadership team.

Forming an account-based leadership team with a small group of key executives can serve two important functions:

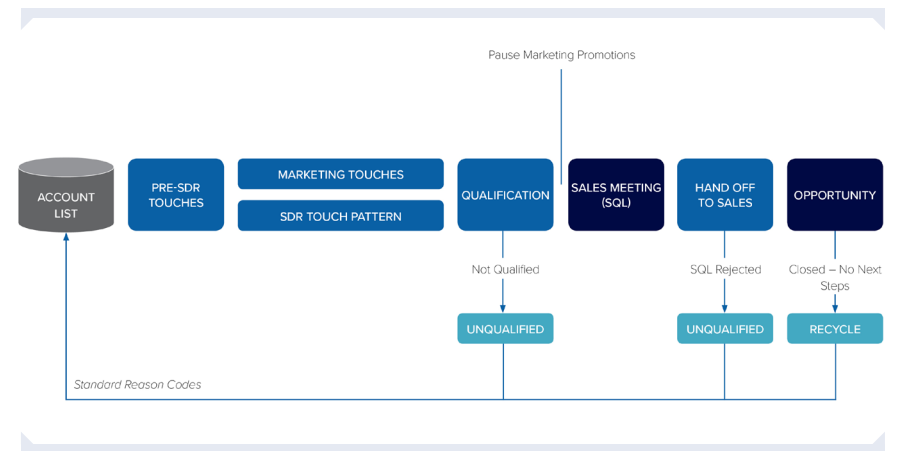
1. Helping align your account-based initiative to the business and its long-term growth goals
2. Ensuring that account-based programs get the resources and support needed from various teams

### Closed-loop feedback with sales and leadership

The truth is, the more you begin to expand your account-based programs, the more you'll need to keep leadership in the loop on progress. You'll also want to establish a closed-loop communication process between marketing and sales to help clearly define outreach, handoff, and feedback. This will ensure that account-based touches are coordinated appropriately and that outcomes are visible to all involved.

But, if nothing else, be sure to schedule time for gathering ongoing feedback and insights from the sales team.

## Closed-loop communication framework



*Sample Closed Loop Process, TOPO 2019*

### Secure a set budget

While you may have been running a pilot earlier in your ABM rollout, this is the time to scope a fully dedicated budget for your program. This should be owned by the marketing manager and clearly defined to leadership. Many marketers in this stage have a set target account list that may be tiered based on a variety of factors. This is one method for organizing how you allocate marketing dollars toward programs. Top-tier accounts often receive more high-investment touches, while lower-tier accounts may receive your “always-on” spend. This is unique to each team, but ultimately you'll begin to have a more strategic budgeting process.



## Market-leading

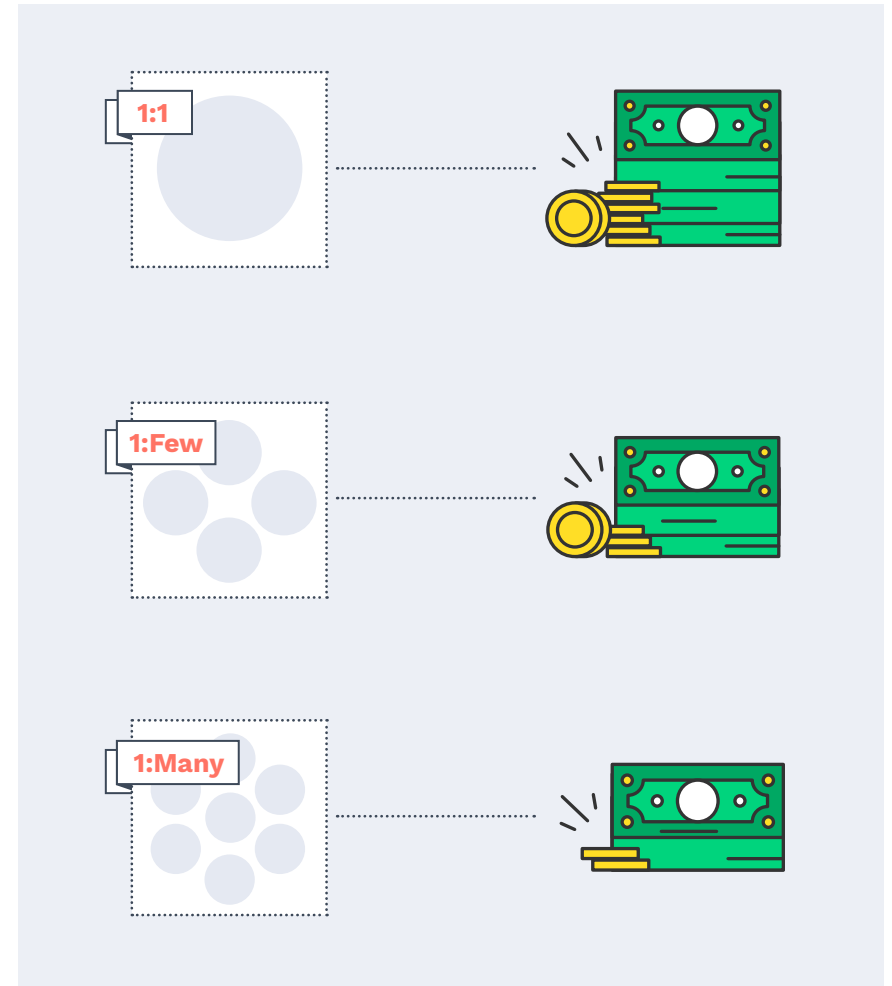
Your organization has allocated dedicated people and budget to your account-based effort, which is sure to lead to better results!

Even those lucky enough to have great support for account-based marketing still have a finite budget, so it's always important to allocate resources thoughtfully. This often means that you'll need to get creative. If you're at this level, you're likely focusing on 1:1 campaigns and have the budget to be more thoughtful about engaging your top accounts. Remix existing content and reuse components from existing assets to personalize creative even more (e.g., to make it more relevant to a segment, such as a vertical).

### Are you switching or scaling?

Talk with any marketer doing account-based, and you'll quickly see a trend: most haven't targeted both customers and prospects or utilized multiple complementary marketing channels in tandem, nor have they cracked the code on how to further scale their programs.

TOPO's research shows that when the company's average deal size warrants it, an enterprise company doing a 1:1 account-based program can spend at least \$50,000 on each account annually. The majority of marketers today focus on creating 1:Few programs as a way to build efficiency and scale. Keep this in mind as you advocate for more budget and resources.



## Chapter 3

# Executing Account-Based Plays

Now that you've refined your approach to your target accounts and defined a plan for ABM resources, you'll need to take a closer look at how you're running account-based plays. While this chapter is a quicker read, it's an essential one. Without a clear plan for running coordinated marketing and sales plays, ABM programs often get stuck and muddled in confusion.



As you've learned, account-based isn't simply a marketing initiative—it crosses multiple teams and tactics. We ultimately see four main types of account-based plays that achieve the following goals:

- 1 Driving engagement
- 2 Resulting in new meetings
- 3 Increasing deal velocity
- 4 Expanding in an account
- 5 Retaining of an account

The more developed your account-based strategy is, the more involved other teams become. And depending on which teams are involved, you'll be able to deploy more robust account-based plays across a wider set of channels. When you evaluated your current programs, where did you fall along the ABM readiness assessment for execution?

★ EXPLORING	★★ DEVELOPING	★★★ OPTIMIZING	★★★★★ MARKET-LEADING
My marketing campaigns provide air cover for our sales team.	My marketing and SDR teams are running orchestrated plays.	My marketing, SDR, and sales teams are running well-orchestrated plays.	My account-based teams are running velocity and expansion sales plays.

## Exploring

Even if you're just getting started with ABM, you probably already have a partnership between marketing and sales development. This is a solid foundation for successful program execution, and with just a few enhancements, your team can become even more account based.

To start refining your account-based plays, your marketers and SDRs need to rally around an established target audience to begin providing air cover. These should be high-fit accounts, whether from your ICP or a set TAL, that you plan to get in front of through various marketing channels.

Here's an example of what a more coordinated marketing and SDR play could look like for your team:



## Developing

If you've gotten your feet wet with better marketing and SDR coordination, you may want to begin expanding your cross-functional team to include more of the sales organization. Whether you're working with an ICP or a set target account list, your team should start to develop a more robust orchestration plan that defines the individuals responsible for completing specific actions within a given sequence.

Without an orchestration plan, marketing, sales development, and sales teams end up delivering piecemeal account touches that frequently conflict with one another and fail to progress prospective accounts.

At this level, you'll likely be running more lightweight plays involving marketing or sales development teams. These are some of the questions you'll be asking yourself:

- ❓ Who's responsible for what, and who's involved when?
- ❓ What existing channels will we use?
- ❓ When will we run coordinated plays?

An effective orchestration plan includes the following components:

- ✓ Clear documentation of all campaign elements—objectives, offers, audience, and resources
- ✓ A multichannel approach executed via a coordinated, cross-discipline plan against the defined objectives
- ✓ Commitment from stakeholders to complete touches and/or reach milestones
- ✓ Resources and guidance for sales reps, built to help them execute an optimized multi-touch pattern
- ✓ Expected outcomes

Example orchestration brief

Outlining an orchestration brief helps align all stakeholders around the key elements of the campaign. Here’s an example of what this may look like for your team:

Account-based brief

- ✓ Objective  
*Set a desired action for the target audience.*
- ✓ KPIs  
*Establish specific, measurable outcome metrics.*
- ✓ Audience  
*Outline the target accounts or contacts you’ll be running this program against.*
- ✓ Personas  
*Include all relevant insight into your audience’s priorities and mindset that could encourage action.*
- ✓ Offers  
*Describe the offers you’ll utilize during outreach, addressing specific value propositions.*
- ✓ Resources  
*List all resources that will be required for execution, including head count, budget, and stakeholders.*
- ✓ Channels  
*Plan and prioritize which channels will be used for promotion, outlining key deliverables and dates.*

Optimizing

Research shows that many organizations that understand the value of an account-based strategy still struggle with building an optimized, easy-to-leverage orchestration plan involving cross-functional teams. As you’re optimizing, you’ll likely begin to involve more channels, more teams, and more budget. This is where things can feel a bit challenging or overwhelming. You’re not alone, and that’s why we’ve devised a few quick tips to help you scale orchestration while staying (somewhat) sane.

Channel expansion

If you’re looking to add more channels and touchpoints, here is a list of the channels that marketers identified that they use most frequently:

“What channels and tactics do you use for your account based efforts?”

CHANNEL	% RATE AS IMPORTANT	% USING	% SATISFIED
SDR Outbound (email, phone)	88%	87%	82%
Events	72%	67%	78%
Executive-to-Executive Outreach	70%	64%	59%
Direct Mail	67%	73%	69%
Digital Advertising	64%	79%	85%
Content Development	63%	47%	61%
SDR Social (e.g. LinkedIn)	57%	72%	61%
Marketing Email	56%	70%	83%
Site Personalization	39%	37%	63%
Content Syndication	31%	48%	73%
SDR Personalized Video	23%	28%	50%
Site Chat/Messaging	22%	17%	74%

% of respondents

Most Important Account-Based Channels, TOPO 2019

### Example campaign orchestration touch-pattern plan

To help you enhance your own initial orchestration play, we've pulled together an example touch-pattern plan for a new campaign. You'll see that it covers timing, touchpoints, audience, owner, content, and notes on messaging. This will obviously be different for each company and outreach type, but putting together your own sample orchestration play is a good way to spot current gaps or issues within your strategy.

Week 1			
Audience	Touchpoint	Team	Messaging
All (can be segmented)	Digital Advertising	Mktg	Push ads to gated whitepaper landing page
All, Segmented	Mktg Email	Mktg	Launch emails to nurture whitepaper downloads with personalized messaging
Decision Maker	Direct Mail	Mktg	Pull together relevant whitepaper themes into direct mail, with physical book

Week 2			
Audience	Touchpoint	Team	Messaging
All (can be segmented)	Digital Advertising	Mktg	Begin pushing ads to associated webinar registration covering whitepaper theme
All	Mktg Email	Mktg	Launch emails to nurture associated webinar registration
Stakeholder/ Decision Maker	SDR Call	SDR	Call to discuss whitepaper, invite to upcoming webinar
Tier 1	SDR Email	Mktg	Send follow-up email with webinar registration link
Executive	Exec Email	Execs	Personalized outreach from relevant exec

Week 3			
Audience	Touchpoint	Team	Messaging
All	Digital Advertising	Mktg	Push personalized demo request ads
All, Segmented	Mktg Email	Mktg	Launch personalized demo request emails following whitepaper and webinar downloads
All	SDR email	Mktg	Send follow-up email with request for personalized demo

### Market-leading

Once you've been running account-based programs for some time, you will need to expand your scope to increase the impact across the business. With this added level of complexity and expansion, the most sophisticated account-based organizations take a full customer-lifecycle view to improve outcomes for their most important customers and prospects at every stage of the cycle.

At this point, your account-based teams will start to focus on two key plays—velocity and expansion:

- Once accounts are engaged and meetings are being set, top-performing account-based organizations add new plays.
- Velocity plays aim to more quickly progress an account through the funnel and decrease the time to revenue and sales cycle.
- Expansion plays broaden customer relationships, growing existing deals and creating new opportunities with current customers.
- The best ABM organizations are expanding their efforts to include more prospects and customers, and even other parts of their own business.

## Chapter 4

# Measuring What Matters

After implementing the recommendations from the first three chapters, you'll want to see the impact. Adopting an account-based focus requires marketers to shift from "traditional" lead-based metrics to account engagement, pipeline influence, and revenue impact. That's why we'll show you how to measure your programs more effectively, making sure you get the credit you deserve for building an impressive ABM strategy.



Before we get into how you can improve your measurement dashboard, take a minute to recall where you landed on the original ABM readiness assessment for measurement. Whether you're Exploring, Developing, Optimizing, or Market-Leading, we have the tools you need to build more effective measurement practices.

★ EXPLORING	★★ DEVELOPING	★★★ OPTIMIZING	★★★★★ MARKET-LEADING
I'm measuring campaign performance and MQLs within our ICP.	I'm measuring account-based engagement within our ICP.	I'm measuring campaign influence on target account pipeline.	I'm measuring campaign influence with an account engagement score model.

## Exploring and Developing

At this stage, you'll want to start evaluating campaign performance and looking at metrics like MQLs and pipeline impact within accounts that fit your ICP.

### What to track

The vast majority of companies that begin to explore account-based marketing also continue to run some level of inbound and/or demand generation activities. The results, which come from outside the target account list, should continue to be measured and managed using traditional demand generation metrics (e.g., inquiry, MQL, SAL, and SQL).

Eventually, you'll want to measure against a set target account list. But for marketers who are looking to run campaigns off of accounts that match their ICP, demand-gen metrics still give plenty of insight.

## Gather internal stakeholders

Without ABM-specific measurement in place, your organization will have trouble knowing where they are succeeding and how to shift investments to make an impact. That's why you'll need to become more rigorous in your reporting, moving past just campaign metrics.

However, reporting on specific account-based metrics is an ongoing effort, so build an internal team that continues to discuss account-based metrics, your data and systems, and how to track success, and keep iterating on reports.

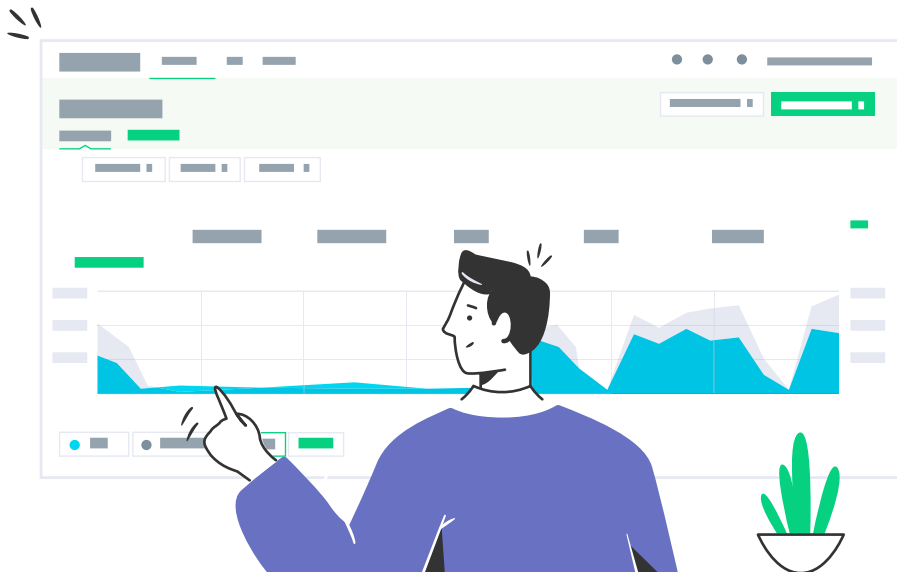
## Optimizing

### Key account-based metrics

According to TOPO, target account pipeline (TAP) has emerged as a key indicator of success for account-based marketing, as it captures your organization's ability to create high-value opportunities within your target accounts. And because target accounts also drive higher win, retention, and growth rates, TAP becomes the most valuable portion of the pipeline for a company.

We recommend focusing on the following metrics:

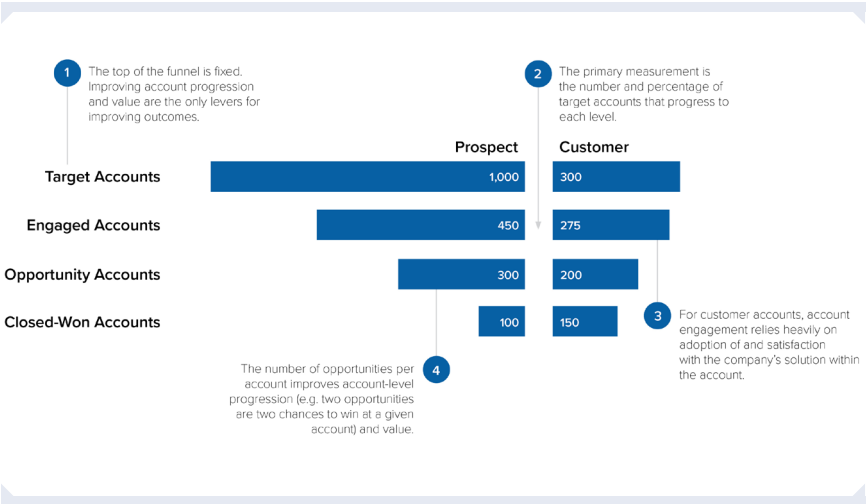
Account Engagement Rate	%	The percentage of accounts that are meaningfully engaged with the organization
Accounts with Meetings	%	The percentage of accounts sales has completed an initial meeting with
Target Account Pipeline	\$	The value of pipeline created with target accounts in a given period of time
Opportunity Rate	%	The percentage of accounts with a new opportunity created in a given period of time
Account Win Rate	%	The percentage of the account list with a new win in a given period of time
Bookings or Revenue	\$	Value of new closed-won deals with target accounts in a given period of time



With an account-based program, your primary objective is to help progress your target accounts through the buying process, which ultimately drives increased pipeline, revenue, and customer lifetime value.

Once you begin to pay extra attention to TAP, you'll want to report more rigorously. This includes building reliable reporting dashboards to track progress.

In this example report, engagement is the first key indicator. But how engagement is defined can vary significantly between companies, often depending on what is easily measurable today across both marketing and sales (as well as customer support and account management).



Account Based Measurement Model, TOPO 2018

In order to measure conversion from target accounts to new bookings across the business, look to a template like the following:

	Prospect	Customer	Total (YTD)
[a] Target accounts			
[b] Accounts with initial qualified meetings			
[c] Account qualified meeting rate (%) [b] ÷ [a] =			
[d] Accounts with discovery meetings			
[e] Account discovery meeting rate (%) [d] ÷ [b] =			
[f] Accounts with new opportunity			
[g] Opportunity rate (%) [f] ÷ [d] =			
[h] Pipeline (\$)			
[i] Accounts with win			
[j] Account win rate (%) [i] ÷ [f] =			
(k) New bookings (\$) [h] x [j] =			

This is an editable PDF; the values above are samples. In Adobe Acrobat, enter your values to calculate your results. If you open with any other program, you will lose calculation ability and will need to re-download.



## Market-leading

Looks like you're out in front of your peers when measuring your account-based results!

Due to the number of potential channels, touchpoints, and systems involved, as well as where data is stored, account engagement is one of the more challenging things to measure. Many companies start slow and eventually either adopt account-based measurement technology or create an account engagement score (AES) model.

### What is AES?

AES is an account-level measurement that rolls up engagement across the full customer lifecycle and includes marketing, sales development, sales, and customer success—although many start with marketing and sales development. Three elements of the AES model must be established before it can be used:

- 1 **Value:** The value of various interaction types based on factors specific to each account
- 2 **Role-based multipliers:** Set up and used to ascribe value to interactions based on the person's role
- 3 **Time:** The time period for measuring AES, which should be significantly shorter than the typical sales cycle

The account engagement score, essentially an attribution model for pre-closed influence, assigns a unique value to each interaction with a target account. For instance, a demo meeting with three stakeholders is three times as valuable as a demo meeting with only one stakeholder. In addition to the core AES (measured with a standard timeframe), a one-week or shorter view quickly identifies account-level spikes in engagement.

### Example AES model

		Value							
		1	2	3	4	5	6	7	8
Marketing	Ad impression served								
	Website traffic (3+ pages)								
	Content form fill								
	Email open								
	Email click								
	Ad click								
	Social engagement								
	Event/webinar registration								
	Recorded demo/video								
	Field event/conference booth visit								
	Inquiry/demo request								
Sales Development	Email open								
	Email replies								
	Phone call								
	Phone conversation								
	Social connection								
	Social response								
	Qualification call								
	Meeting booked								
Sales	Intro meeting								
	Dinner/networking event								
	Demo meeting								
	Sales calls/meetings								
	Proposal								
	Pilot								
	Closed-won								
Customer Success	Group training								
	Product use (threshold)								
	NPS survey								
	Standing CS meetings								
	External QBR meetings								
	Forum/community post								
	Forum/community answer								
	Customer reference complete								

### Measuring individual channels and tactics

Individual elements of a program often cannot be effectively measured on their own, and instead, the incremental impact of individual elements should be measured through A/B testing.

A direct mail piece, for instance, may encourage the recipient to visit a dedicated landing page. However, the bigger impact of the direct mail piece is often seen in the improved response rates to SDR outreach, not in the number of people who follow the directions and visit the page.

A personalized digital ad, on the other hand, may promote a high-value report. However, the bigger impact of the digital ads is often seen in the improved response to SDR outreach, not in the click-through rate of the ad or traffic to the whitepaper landing page.

Example: A/B Testing			
	Test*	Control	Total
Accounts	250	250	500
Accounts with opportunities	40	20	60
Opportunity rate	16%	8%	12%

*Test = Specific, account-based plays deployed*

## Conclusion

# What's Next?

Now that you've walked through *The ABM Readiness Assessment*, explored your rankings, and discovered new ways to uplevel your current approach, we hope you feel empowered to take the lead on your account-based programs. If you're still hungry for more account-based resources, explore our hub of best practices. Below are some links to a few of our top resources that can help you right away:

- [How to Develop an Ideal Customer Profile for ABM](#)
- [Ideal Customer Profile Fill-in-the-Blank Template](#)
- [The Big Book of ABM Campaigns](#)
- [How to Effectively Measure ABM](#)

If you're ready to dive into more specific tactics, our team of account-based experts is trained on this framework and can take you through your results and next steps in detail. Set up a time to learn how the RollWorks Account-Based Platform can help you uplevel your ABM program today, regardless of where you fall on the account-based readiness spectrum.