The ABM Agency
Account-Based Marketing
Sales Playbook

The ABM Agency | 239 Grant St SE #103 | Atlanta, GA 30312
E: sales@abmagency.com **W:** abmagency.com **T:** 678-592-5398

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Why Do You Need a Sales Playbook?

Account-based marketing (ABM) is a total team effort. Marketing, customer experience, and sales work hand in hand to execute tailored experiences with the same objective: winning new business, whether it's with new or current customers. While you might all be on the same page about company goals, that doesn't always mean ABM is always a straight-forward experience—especially if this is your first foray outside of traditional outreach methods.

But we're here to help make this process and shift into ABM easier, for sales in particular. "Marketing" might be in the phrase itself, but ABM success cannot be achieved without a dynamic sales team
armed with the necessary information.

Over the next several pages, we'll walk you through all things ABM and sales—from an informative overview of the strategy to sales funnel specifics to best practices.
We hope you find this playbook useful, but if you have any additional questions, please feel free to reach out. When the sales team is confident in the next move, the entire ABM program stands to succeed.

Let's get selling.

What is Account-Based Marketing?

Account-based marketing, or ABM, is a focused approach to B2B marketing that aligns sales and marketing teams and targets only high-value, best-fit accounts (those that are in-market and likely to make a purchase). Due to its powerful return and boosted loyalty among customers, ABM is quickly being adopted by B2B companies to generate higher-quality leads and grow revenue year over year.

While traditional marketing tactics take a broad approach by targeting a variety of accounts at once, ABM strategies only target in-market decision-makers. Cold-calling accounts with a mass outreach approach is (thankfully) long gone.

It's all about coordination, precision, and efficiency.

What ABM Is	*What ABM Isn't*
Engaging only the buying committee	*Reaching out to every single person involved in a target account's marketing strategy*
Aligning sales, marketing, and customer experience teams	*Competing against other teams and not utilizing your resources effectively*
Making outreach decisions based on data	*Making outreach decisions based on a "gut feeling"*
Creating messaging and assets that are personalized for each account, stage of sales funnel, and buyer persona	*Creating messaging and assets that will be delivered to each account, no matter the stage of the funnel or buyer persona*
Using an advanced account scoring system to measure success and sales funnel placement	*Only paying attention to broad metrics like engagement and product/service interest*
Continuously nurturing your relationship with an account to determine their needs and if you can upsell or cross-sell down the line	*Leaving an account alone once you win their business initially*

The Benefits of ABM

ABM FAST FACTS

84%

of companies using ABM report a higher ROI than other marketing strategies (Information Technology Services Marketing Association)

82%

of B2B marketers say ABM greatly improves alignment between sales and marketing. (LinkedIn)

86%

of B2B companies saw an increased win rate with ABM. (TOPO)

80%

of B2B companies saw an increase in lifetime value of customers using an ABM approach. (TOPO)

91%

of teams using ABM attribute larger deal sizes to ABM, with 25% reporting a 50% increase in deal sizes. (SiriusDecisions)

The numbers don't lie. ABM is beneficial on many levels—but if your sales team wants to see this level of success, you'll need a thorough understanding of how ABM delivers these results and where your role fits in.

Sales Benefit #1: Enhanced Audience Targeting

How to Select Your Target Accounts

On average, a B2B customer will regularly use six different interaction channels throughout the buying journey—and there are typically six to 10 decision-makers within the buying committee. So how can you ensure you're talking to the right people and serving them applicable information and messaging at the correct stage of the funnel? It starts with identifying targets in an informed, strategic manner.

Targeting specific accounts is far from a new concept, but targeting in ABM has its own process and set of guidelines to follow. Instead of competing with marketing to find and engage targets, you'll coordinate with them. Instead of looking at territories, you'll look at target account lists. No more using your ideal customer profile (ICP) as general advice; it's a hard-and-fast rule.

There are different filters you use to target within an ABM campaign, but the process begins with developing your ICP.

A good place to start is with your current account list, but since ABM requires efforts from both sales and marketing, you'll want to set up a time to develop the new ICP with everyone's input and information.

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"Who is your ideal customer?"

Your ICP characteristics can include:

- *Industry or industry segment*
- *Geography*
- *Company size*
- *Revenue potential and growth rate*
- *Public vs. private companies*
- *Length of sales cycle*

What You'll Use to Develop the ICP:

- *Qualitative and quantitative analysis*
- *Intent data*
- *Predictive analytics*

Once your ICP is developed and agreed upon, it's time to get to work. This means determining qualified accounts, creating target account lists, and pulling contact information that aligns with the ICP.

In this stage, you'll look at the following filters:

- *Current customers and engaged prospects*
- *Customers of competitors*
- *Job title categories*
- *Names*

Sales Benefit #2:
In-depth Data and Reporting Capabilities

All of the effort—including targeting, account list building, and the outreach itself—both sales and marketing put in is meaningless without one thing: knowing if it's even working. Are the accounts interested? Do they want more information? Have they moved from awareness to consideration?

This is where ABM reigns supreme; the type of analytics and reporting structure you'll use sees through messy analytics data and identifies an account's progress through the sales funnel—all while providing clear visual and quantitative dashboards for the involved parties (sales, marketing, the C-suite, etc).

Sales Intelligence

The data and information the sales team will have access to:

- *Topics of interest*
- *Assets/content consumed*
- *Actions taken over time (downloads, email response, forms filled)*
- *Full timeline: all of the above in chronological order*

Account Scoring

A main pillar of ABM is engaging with accounts at the right place and at the right time. One of the ways this is done is through account scoring.

Account scoring, sometimes called account engagement scoring, is a way to assign value to customer interaction and rank the level of engagement based on which digital assets and content were consumed. The lower the score, the more work will need to be put in for the account to move toward the end goal (conversion).

Note: An account score isn't just a singular data point. It's a compilation of several metrics and information, which can be customized by campaign.

So what makes up an account score? Generally, you will look at 5 key buckets in order to generate the total score; each score is predetermined and ranked by itself.

1. ***First and third-party intent data:*** *Intent data uses IP addresses and browser cookies to track visitors around the web—and serves as a powerful predictor of which accounts are in-market or consuming information relevant to your industry or services. First-party intent data provides information about activities targets perform on your site while third-party intent data reveals what accounts are doing on other websites—like review sites and publications.*

2. ***On-site page views:*** *You'll want to know who's on your website and what they're consuming. On-site page views are aggregate scores based on how much interest is being shown on your site's content and pages.*

3. ***On-site interaction score****: Once a target is on your site, they will start to engage with what they find. There will be a different score by action—be it a CTA click, PDF download, ROI calculator, or form submission.*

4. ***Campaign score:*** *A campaign score is exactly what it sounds like; it refers to how an account interacts with paid campaigns, email campaigns, or any other digital marketing channel your company is executing tactics on (PPC, programmatic advertising, etc).*

5. ***Content score:*** *A content score reveals how an account is interacting with content syndication. Did they download a white paper? That action will get a point. Did the account not even open the case study you sent to them? No dice.*

Get to Know the ABM Funnel

"...for the [prospects] that we do target with ads, late stage opportunities, we see 60% higher close rate. For those that are at the middle of the funnel, the ones that were focused on converting, they moved 30% faster. So, there's no doubt in my mind that [ABM] is effective. — Nash Haywood, Global Director-Digital Conversion & Paid Media, Genesys

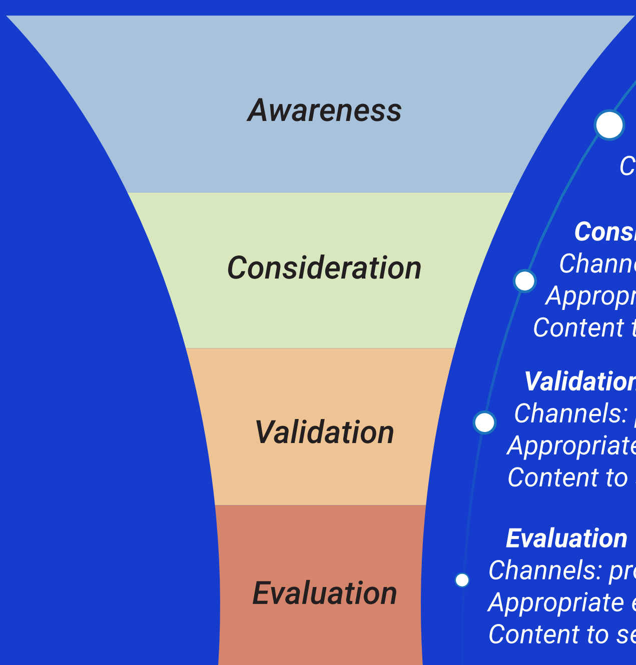
Like the typical sales funnel, the ABM funnel has four stages:

- *Awareness*
- *Consideration*
- *Validation*
- *Evaluation*

For your own knowledge, the ABM sales funnel stages can also be referred to as the following:

- *Interested*
- *Engaged*
- *Qualified*
- *Pipeline*
- *Closed/Converted*

For consistency's sake, we use the former. No matter what you call each stage of the ABM sales funnel, however, you must use a strategic approach



Awareness
Channels: content marketing, programmatic
Appropriate engagement: LinkedIn connection
Content to serve: e-books or blog posts

Consideration
Channels: programmatic, LinkedIn, Microsoft ads
Appropriate engagement: email
Content to serve: webinar, white paper

Validation
Channels: programmatic, Linkedin, Microsoft ads
Appropriate engagement: phone call
Content to serve: case study

Evaluation
Channels: programmatic, Linkedin, Microsoft ads
Appropriate engagement: all of the above; phone call, email, etc.
Content to serve: push for contact engagement, RFQ, etc

Here's what your sales team should know about each stage of the ABM sales funnel.

Awareness

The prospect is either aware they have a problem that needs to be solved or they're aware of your company or product.

"I think I may want to buy a new vehicle."

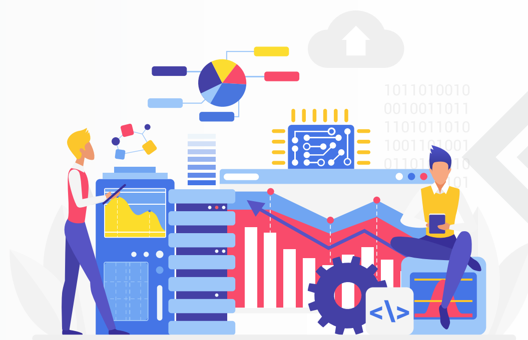
Example of content to serve: e-books
or blog posts Types of appropriate engagement: LinkedIn connection

Consideration

Prospect accounts now know you exist, and you're officially in the running. Continue to nurture the account with valuable assets and personalized content.

"I want a mid-size SUV."

Example of content to serve: webinar, white paper
Types of appropriate engagement: email outreach



Validation

Target accounts are now gathering specific information about what you offer: features, prices, etc. You must continue to explain why your product is the perfect solution for their problem

"I want a 4-door, V6, 3rd row seat, 4-wheel drive SUV with a towing capacity of 5K+, and I will lease it."

Example of content to serve: case study
Types of appropriate engagement: phone call

Evaluation

A final decision to move forward will be made in this stage. It requires unparalleled alignment between sales and marketing to nurture and persuade the buyer that this is the best option.

"Honda Pilot, Chevy Traverse, and Ford Explorer look like my best options to choose from. I'll go with one of them soon."

Example of content to serve: push for contact engagement, RFQ, etc
Types of appropriate engagement: all of the above; phone call, email, etc.

Remember: Timing is Everything (Patience Required)

We get it. The longer sales cycle is frustrating. Additionally, Google and Bing make it so a majority of the buying process is complete without any sales interaction.

Don't worry: Sales is important as ever in ABM, but you just have to identify accounts early and avoid rushing the process.

Coordination + Continued Preparation

As a member of the sales team, it is your job to be familiar with the ABM process as well as with the content you'll be delivering to the target accounts and the process. In a successful ABM campaign, you must do the following:

1. Coordinate with sales leadership

2. Leverage your customer relationship management tool (CRM).

3. Establish channels of communication with your ABM partner

4. Know the content

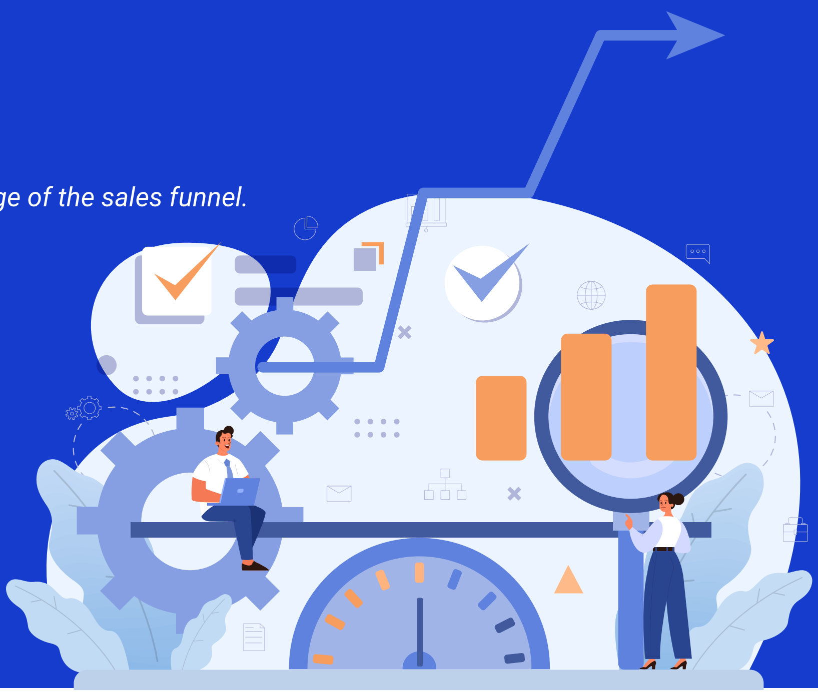
Marketing may have produced the content, but if accounts have questions, they're coming to you. Familiarize yourself with the following available assets in advance:

- *Website pages*
- *Purposed landing pages*
- *White papers*
- *Case studies*
- *Blog posts*

5. Know the process

This cannot be said enough:

ABM tactics differ by account and by stage of the sales funnel.



Here's how your process will be broken down.

Awareness Stage

Accounts are not ready to convert; don't treat them like they are.

Sales Step 1: Company Website

Look at the company website; see who works there, if they have a newsfeed or blog. Sign up for the newsletter (and create a separate email folder for newsletters); check out their current case studies.

Sales Step 2: LinkedIn Sales Navigator

In your main feed, save the company as a lead to see their feed, then save key decision-makers as leads to see their feed as well.

Send connection requests, but only to 2nd-degree connections. Mention and leverage your common connection. Example: "I saw you were connected to John Doe and thought we might want to connect as well." Do not go with a sales pitch angle.

Sales Step 3: Social Media

Follow companies on Facebook, Twitter, and Instagram.

What Not to Do in the Awareness Stage

- *No emails (these will be handled by a marketing automation platform)*
- *No photo calls*
- *No sales pitches*

Consideration Stage

Nurture with care, and communicate any updates and interactions.

Sales Step: LinkedIn Sales Navigator

Send connection requests with tailored notes; like the personal and company shares and posts. Comment periodically and graciously on relevant posts and shares.

Any replies or requests from the prospect company need to be communicated to sales leadership and your ABM partner so the campaign can be adjusted accordingly.

What Not to Do in the Consideration Stage:

- *No emails (these will be handled by a marketing automation platform)*
- *No phone calls*

Validation Stage

It's game time; this is the stage where you really need to put in the work.

Sales Step: LinkedIn Sales Navigator

Send target account an InMail message with a link to a buyer's guide or other relevant content; your ABM will provide the correct link with a tracking code.

Endorse target account for skills, and continue thoughtfully commenting on their relevant posts.

Evaluation Stage

If the target account converts (raises their hand) with a request, you'll reach out but you must follow the below steps before you do.

Review all news feeds specific to company and contact

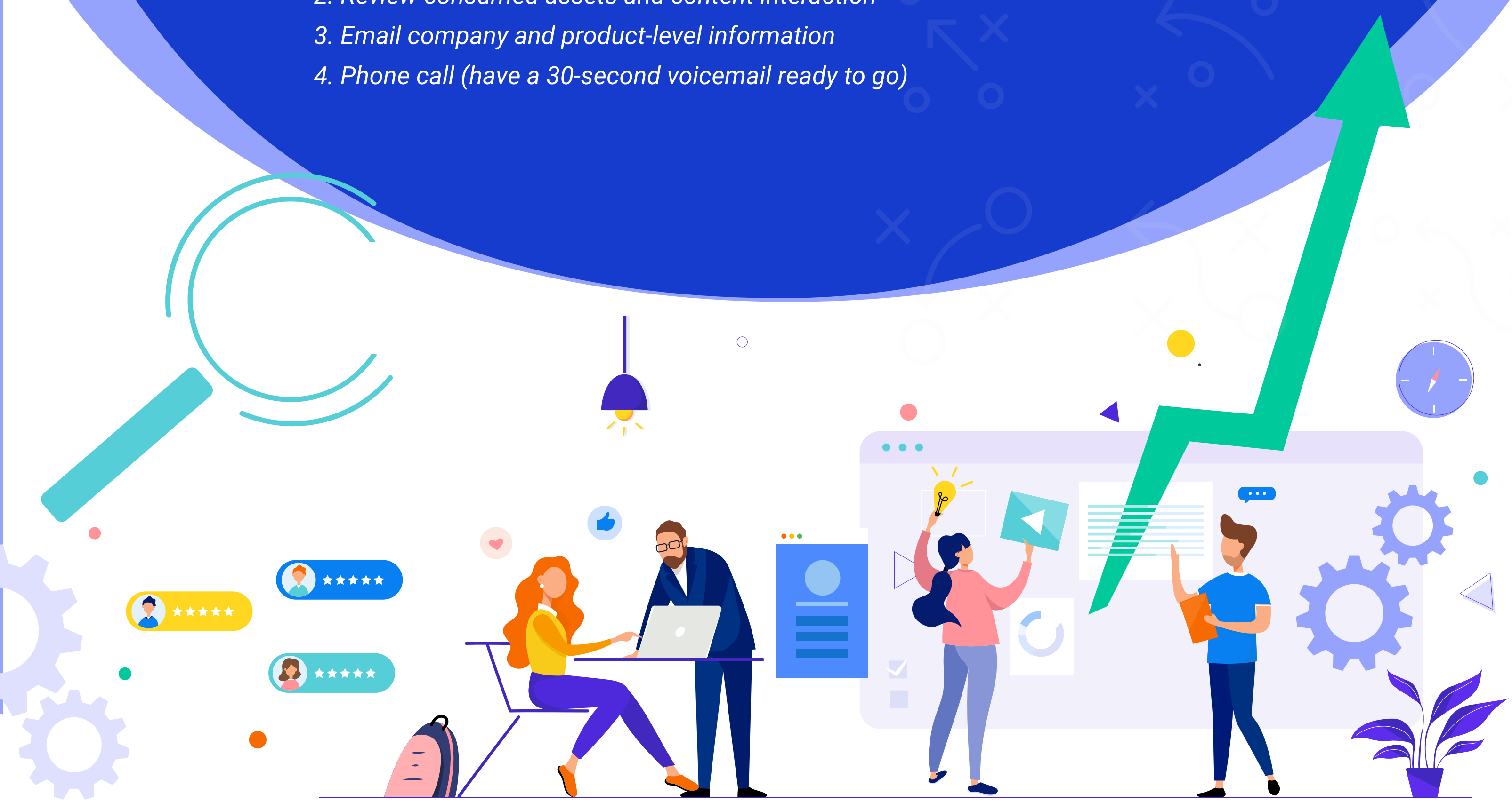
Review all consumed assets and content interaction

Email company and product-level information

Phone call (have a 30-second voicemail ready to go)

If they haven't converted but are "ready to buy" (your ABM partner will communicate when that is), the same steps apply.

1. *Review previous news feeds specific to company and contact*
2. *Review consumed assets and content interaction*
3. *Email company and product-level information*
4. *Phone call (have a 30-second voicemail ready to go)*



LinkedIn Outreach Examples

InMail

Hi [NAME],
I came across your profile after someone from [COMPANY] came to our website and thought connecting could be mutually beneficial. As we enter the new year, I know the [TOPIC OF INTEREST] will be top of mind.
That said, I wanted to share [RELEVANT PIECE OF CONTENT]: LINK WITH TRACKING
At [YOUR COMPANY], we [WHAT YOU PROVIDE].
Don’t hesitate to reach out if you ever have any questions or would like a free demo.
Thank you,
[YOUR NAME]

2nd-Degree Connection Request (asking for an introduction)

Hi [NAME],
[Add a personal touch]
Would you be willing to introduce me to [NAME OF TARGET YOU WANT TO BE INTRODUCED TO] (LINK TO LINKEDIN ACCOUNT)?
[Explain why you want the introduction, and what is in it for the connection]
Thanks,
[YOUR NAME]

3rd-Degree+ Connection Request

Hi [NAME],
I noticed your extensive [EXPERIENCE] aligns with what we do at [COMPANY], and I’d love to connect.
Please let me know if you have any interest in learning more about [WHAT YOUR COMPANY OFFERS].
Best,
[YOUR NAME]

Email Outreach Examples

Email example #1: Consideration

Hi [NAME],
Hope all is well! I noticed you run [Department] at [Company Name] and wanted to quickly introduce myself.
I work at [Company Name]; we previously connected with [Name] around [Product or Service], and wanted to follow up to see if this was something that is currently on your radar.
I’d love to connect if you have some time this month and learn more about how you’re [X, X, and X]. In the meantime, I thought you might find this [CONTENT] interesting: [INSERT LINK WITH TRACKING].
Are you free to connect later this month?
Thank you,
[YOUR NAME

Email example #2: Validation or Evaluation

Hi [NAME],

I can't believe it's already been a month since our teams last spoke, but I saw you were still interested in our company's [PRODUCT or SERVICE]. I'd love to reconnect and provide any additional insight or information. Since we had our initial phone conversation, we've [UPDATE] and [UPDATE] in order to [WHY]. Take a look at our buyer's guide: [INSERT LINK WITH TRACKING].

I'd love to share some recent success stories and these news updates with you if you have 20 minutes to spare any day next week.

Let me know your thoughts. Thank you,

[YOUR NAME]

Example of Strategy and Cadence

You have a thorough understanding of ABM; you have a gameplan. Your assets are ready to go. Now it's time to determine what your ABM outreach cadence should look like.

Prepare, prepare, prepare: Knowing what content you'll serve, what message you'll communicate, what time you'll send… Everything should be planned in advance.

Take a look at the below example; this is a step-by-step guide that continues across a time frame of several weeks.

Sales Account Outreach Plan

- ***Day 1**: Account has reached validation or evaluation stages*
- ***Day 1**: Initial outreach email (or InMail if you don't have decision-makers' email addresses); reference their most recently consumed content*
- ***Day 3**: Voicemail and follow-up email with case study*
- ***Day 6**: Email "Just checking in", mention something from their news or LinkedIn feed.*
- ***Day 10**: Follow up with meeting request*
- ***Day 12**: Demo*
- ***Day 13**: Follow up with answers to demo questions*

Best Sales Practices for ABM

1. ***Always know the account or the contact before outreach***. *Cold-calling or messaging does not resonate in ABM. Read up on their business and what they provide, market trends, keywords they might be interested, and recent top hires.*
2. ***You will only focus on accounts who have previously engaged or those showing intent to purchase.*** *If thereis even just a glimmer of intent, that's your sign to reach out.*
3. ***Save the long emails for something else;*** *all communication should be clear, concise, and to the point. The general rule is as follows: Emails are under 100 words; voicemails are no longer than 30 seconds*
4. ***If it's not personalized, it's not ABM.*** *The more tailored the message, the more likely it will resonate.*
5. ***Give content freely.*** *Leverage your marketing assets (case studies, product demos, industry reports, etc.) appropriately throughout the funnel stages.*
6. ***ABM should be an omnichannel effort***. *Don't just stay on LinkedIn because that's where you're most comfort able. Keep the messaging consistent, but use multiple channels in order to reach the target.*
   Grab their attention, then build the relationship. In order to stand out from the other sales teams, you need to be creative. That might mean unique subject lines, must-open mail, or unforgettable email content.
7. ***Grab their attention, then build the relationship***. *In order to stand out from the other sales teams, you need to be creative. That might mean unique subject lines, must-open mail, or unforgettable email content.*