

Win with ABM

Everything you need to know
to create and scale account-
based experiences



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The Account-based marketing has become the dominant way that companies are identifying and new pursuing opportunities—and seeing performance growth.

According to the [Dun & Bradstreet 8th Annual B2B Sales & Marketing Data Report](#), 86% of teams that are using an ABM strategy saw increased performance, while 64% of teams not using ABM saw no increase.

Honestly – it’s just good marketing (and sales). Understanding your addressable market, most likely buyers, and how and when to reach them effectively is the foundation of successful growth strategies.

But challenges remain for many B2B teams, including wrapping their heads around just what ABM is and how to run an ABM program successfully. According to a 2022 study by [Statista](#), the 270 B2B marketers surveyed reported these challenges to executing an ABM strategy at their companies:

- 40% said lack of internal expertise
- 1% said no interest in running a specific kind of ABM project
- 23% said lack of consensus on the best approach
- 8% said no budget

That’s where we come in. We understand how important it is to have a great account-based strategy in today’s digital-first world, but we also hear the questions B2B teams ask and see the hurdles they face.

Our goal is to give B2B revenue teams the information they need to create and scale their ABM strategies so that they can deliver end-to-end account-based experiences that engage and delight buyers—and help them close more deals.

With this ebook, you can learn:

- What account-based marketing is and why you should be thinking holistically about account-based experiences
- Why you should implement an ABM strategy and how your marketing and sales teams can gain from it
- What to consider when planning your ABM strategy
- How to identify your ideal customers and accounts
- Tactics you can use to be successful with account-based marketing
- What to consider when evaluating tools and tech for your program

ABM can be a significant undertaking, but one with significant rewards. The information here can help you build or scale your program to increase your chances at success.

What is ABM, Really?

The first thing to understand is that even though we may say “account-based marketing,” ABM isn’t only for marketers. There can—and should—be a role for every team that contributes to revenue growth.

Account-Based Marketing (ABM) is a go-to-market strategy that brings ops, sales, and marketing teams (and perhaps more) together with a single purpose: to target and convert high-value leads. Successful ABM strategies are driven by personalized experiences built on a strong foundation of customer and account data and deep understanding of personas and buyer journeys.

What ABM is not:

- ✗ A marketing campaign on its own
- ✗ Just one channel or activity
- ✗ Spray and pray sales and marketing

The purpose of account-based marketing is basically to cut through the noise and identify the prospects most likely to convert.

You do this by using data to identify the buyers who:

- Have the best fit for your business
- Have intent to buy, and
- Don’t present a high degree of risk for your business

That means you can spend less time on prospects with less value and less likelihood of converting. You can also spend more time aligning your sales and marketing teams’ time and effort on engaging with prospects and accounts more likely to yield ROI.

Once those buyers are identified, sales and marketing teams collaborate on strategies, experiences, and content targeted at those buyers, and designed to capture their attention and move them through their buyer journeys, from awareness to decision.

ABM is a strategy that shifts you toward more focused marketing and selling one-on-one, where the one is a buying group at an account. This helps you to improve your ROI from your marketing efforts and capture the right buyers—and let your sales team have conversations with buyers who are more likely to convert.

ABM or ABX?

A new term is on the rise that you may have seen: ABX, or account-based experiences. Really, it’s account-based everything and speaks to that need to have a planned, strategic, end-to-end buyer journey mapped out for high-value accounts. An account-based experience encompasses every touch and has become especially important since the acceleration of online buying journeys because of the COVID-19 pandemic.

According to Think with Google on the [Future of Marketing](#):

- 90% of marketers said “personalization significantly contributes to business profitability” in a survey.
- 61% of people “expect brands to tailor experiences based on their preferences”
- 46% of people want to go through their entire buying journey on their smartphones

Planned and personalized online experiences are crucial to converting buyers who expect brands will know something about their interests and deliver relevant messages—and do it digitally.

We’ll continue to use ABM throughout this ebook since it’s more recognized across the industry. However, we’re thinking about it as ABX.

Why ABM?

ABM is more than just a sales and marketing fad for a reason. Companies that implement strong ABM strategies see and report real benefits and are more likely to stay ahead of their competitors. The flip side of that is that companies who haven’t yet gotten on the ABM bandwagon are at risk of falling behind—or already have.

Learning Experience Alliance (formerly Martech Alliance) rounded up some relevant numbers for 2022, including:

- About 94% of marketers say they’re running some kind of ABM program—but only 67% of brands are using ABM
- ABM delivers a 97% higher ROI than other types of marketing
- Mature ABM programs result in 79% of all sales opportunities

So, chances are you’ve already thought about ABM (or ABX) and have dipped your toes in the waters and your real question is how to mature and scale your program. Let’s get to the foundation you need to do just that.

Before You Start

As we've covered, true ABM or ABX isn't a one-off activity and it isn't done by just one team, i.e., marketing. It's a mindset that has to be adopted by everyone driving revenue growth at your company.

Here are some key steps to take to help your teams make ABM a way of life.

KNOW YOUR GOALS

It's just a good practice to answer this question before starting any kind of revenue growth program: why are you doing it?

The first step in your ABM implementation is to know what you want out of it. What goals do you want to accomplish?

Some questions you might ask during this step to prioritize your goals:

- Do I want to focus on acquiring new customers? How many?
- Do I want to focus on upsell or cross-sell to existing customers? What product(s)?
- Do I want to focus on increasing revenue? By how much?

When you know what outcomes you want to achieve, you should have a clear idea of what success means for your campaign. You can then define your KPIs to measure success.

PLAN, PLAN, PLAN

An account-based experience has to be planned from end-to-end. ABM is an orchestrated journey, and when done well, can come together beautifully like a symphony. But that means you can't get halfway through the performance and just start improvising.

You need to have a thorough understanding of your buyer's journey in order to guide them through it and you have to map out every step, from first touch to last. That includes the pieces of your marketing campaign, but also the hand-off from marketing to sales. You can have the best marketing campaign in the world, but if those leads just sit in a CRM and nothing happens to them, your ABM strategy will fail. Proper comprehensive planning ensures your buyer's experience is seamless and helps them make the decision to purchase.



MAKE YOUR STAKEHOLDERS YOUR ABM CHEERLEADERS

Your account-based marketing program will be most successful if you get buy-in from key stakeholders across your organization. Getting this agreement will result in a more effective ABM strategy and reduce friction as you get it up and running. It'll also mean your buyers get a more consistent experience because everyone will be in concert on what you're trying to accomplish and how.

You'll need to agree on some fundamental pieces:

- What are your goals for your program?
- Who has ownership of your account-based marketing strategy? Who will be involved in executing it?
- What is the budget for your program? How much is your business willing to invest? What technology and tools are available or need to be acquired?
- How will you measure success? What's the expected ROI for your program? How will you document and report your KPIs?
- How ready is your organization to implement account-based marketing? A self-assessment may be useful.

ALIGN YOUR TEAMS

Since it encompasses the end-to-end buyer's journey, account-based marketing works best when marketing and sales teams agree not just on the overall ABM strategy, but also how to implement it. Working together, you'll need to create a realistic account plan that supports your business goals.

As you plan your ABM strategy, you should ask and answer some key questions:

- Who are the relevant stakeholders for your target accounts? Who makes the buying decisions?
- What are your account stakeholders' needs or challenges? How does your solution offer value? How does it do that differently from or better than your competitors?
- What experiences and content do you need to offer to engage those stakeholders? In what channels?
- How will your sales and marketing teams work together cross-functionally at different stages of the buyer journey?



REVENUE TEAM, ASSEMBLE

It's crucial that you assemble the right team with the right skills to bring your ABM strategy into its endgame—revenue growth. You can no longer be just a marketing team or a sales team. You have to unite as a collaborative revenue team.

Some of the roles and skills you may want for your team include:

- Marketing and sales strategists who can look at the big picture and how all of your tactics will work together to move your buyers through their journeys
- Sales reps who interact with your buyers regularly and can provide insight into their needs and wants
- Marketing analytics experts who can help you make the best use of your customer data, as well as define KPIs and how to measure them
- Content marketers and copywriters who can plan and execute your content strategy
- UX designers who can create frictionless and engaging digital experiences with your buyers' needs in mind
- SEO strategists or specialists with a deep understanding of search intent and search optimization so your buyers can find you organically
- Paid media strategists or specialists who can plan and implement audience-targeted ad campaigns through search engines, social media, and other ad channels

- Email marketers who can help you reach your target audiences with direct email contacts
- Social media strategists or specialists who know how your buyers are using social media and the best ways to reach them through this channel

If you're in a smaller organization, you may have single individuals filling more than one of these roles. You may also see the need for additional roles on your team, like a representative from your customer success program. But generally speaking, these are the skill sets that will combine into an effective and engaging ABM program.

GET THE RIGHT TECHNOLOGY AND ABM TOOLS

Once you've identified your goals and how to measure them, and gotten your team in place, consider the technology that can help you implement your program. A benefit of today's MarTech stacks, driven by machine learning and AI, is that you can automate much of your program once you've designed your strategy.

One tool that can be immensely helpful is a good customer data platform. A CDP can help you manage and glean insights from your account and customer data to better optimize your program and your results.

Dun & Bradstreet offers D&B Rev.Up ABX, which includes a CDP that can help you:

- ✓ Connect your data across the different parts of your organization and gain a more comprehensive view of your accounts;
- ✓ Build your ideal customer profile;
- ✓ Segment your accounts to identify the right buyers to target; and
- ✓ Activate your omnichannel digital campaigns.

Create Your Ideal Customer Profile

To identify accounts to target, you first have to know who you want to sell to. With ABM, the answer can't be "everybody." It's time to think through and narrow down who your best buyers are—the ones with the interest, purchasing mindset, and money to spend.

In short, it's time to build your Ideal Customer Profile.

An Ideal Customer Profile, or ICP, is a bit self-explanatory—it's a set of criteria that helps you define who your best buyers and to target accounts. However, teams often scratch their

heads trying to determine and prioritize those criteria. One way to arrive at your ICP is to create multiple theoretical profiles and rank them from best to least preferred (a good opportunity to weed out accounts that aren't the right fit).



What is an Ideal Customer Profile?

A description of the company that's the right fit for what you're selling, including key details. Those may include items like:

- ✓ Revenue
- ✓ Business size
- ✓ Industry
- ✓ Location
- ✓ Technology they use

As you build your ideal customer profile, you might think about factors like “we know we solve for this use case for this kind of company,” so you know you’d want to target other companies that fit that use case. You might create a sophisticated set of segmented user personas for more mature organizations, with a variety of “familiar” segmentation approaches in between, based on organization size or industry.

If you have an ideal customer profile, being able to match your account list to that profile is an obvious first step in prioritizing your time. Tools that automate lists of companies that match your profile—and keep that list updated—can be indispensable.

Maybe you need some help in defining that ideal customer profile, especially if you need to go beyond the basics of segmenting around company size or industry. An efficient way to start is to gather data on your existing customers to glean insights into who your most lucrative buyers already are, which can help you target similar buyers or identify opportunities with new types of accounts.

A good next step is to identify “look-alike” companies that match your ideal profile, giving you a set of targets that are more likely to be receptive, and so are worth prioritizing.

EXAMPLE: Let’s say you’re marketing high-end office furniture like sustainable, designer ergonomic chairs. Your ICP might look something like this:

- Over \$100M ARR (can afford your product)
- Growing (more likely to have available budget than a company that is shrinking)
- Relocation and/or opening new offices (needs new furniture)
- Over 50% employees are office workers (greater need than a remote workforce)
- High Tech and BioMedical segments (more likely to invest in designer style)
- Corporate initiatives around environment (willing to invest in sustainable products)

You should have a rationale for each criterion in your ICP. But also, be conscious of not being too narrow or you could end up with a universe of accounts that is too small to support your goals.

Driving Your ICP with Data

You've identified your criteria for your ICP. Now, how do you actually identify accounts? It all starts with data.

Different kinds of data tell you different things about your potential accounts. You'll want to consider having some combination of:

- First-party data
- Second-party data
- Third-party data
- Company and contact data
- Technographic data

FIRST-PARTY DATA

First-party data, also called deterministic data, is data that you gather directly from your customers. You may gather that data through cookies or pixels on your website, or your customers might just give it to you. They fill out a profile or a form on your website and offer up their emails, phone numbers, and addresses, and maybe check some boxes about their likes and interests. First-party data is an excellent source to use for retargeting ads, building nurture email lists, and sales outreach.

However, one of the challenges with first-party data is that it often is anonymous. If you're gathering information through a cookie or a pixel to glean information about your users'

behavior as they consume content, you may not be tying that data to an actual person.

An anonymous visitor identification service, like Dun & Bradstreet's [Visitor Intelligence](#) solution, can be handy to deanonymize these visitors, associating them with the companies they work for. A tool like this can help you figure out which of your target accounts are in-market and are engaged with your brand.

SECOND-PARTY DATA

Second-party data is essentially the same information you'd collect as first-party data, you're just getting it from another source, like a partner.

Say you have an agreement with another business whose solutions complement yours and you have also agreed to trade data about each other's customers that is mutually beneficial. You may get useful insights from their data that you didn't uncover in your own first-party data, but that can help you refine and segment your account list. For example, because your partner is offering a different and complementary solution, they may have a different perspective on customer interests and behaviors that you don't.

Second-party data also is useful for ad retargeting, nurture, and sales outreach.



THIRD-PARTY DATA

Third-party data is data gathered from some other source about businesses or users in general, without that direct connection to your customers. Third-party data often is data you purchase that can complement your first-party data to give a more holistic picture of customer behavior and the overall marketplace.

A subset of third-party data is intent data. That's the information that tells you about user behavior online that can help shed light on their interests and when they're in a buying frame of mind. Intent data is built on searches and understanding how, when, and why someone searches for a particular keyword. Certain kinds of phrases indicate that someone is interested in a purchase. For example, the keywords "best" or "near me" connected with what you sell can show that someone is in-market for your product or solution.

To build your account list, you can connect relevant transactional searches to the data that fits your ideal customer profile. So, someone searching "best sustainable office chair" and that your data tells you works at the type of company you want to sell to could go onto your account list.

Keep in mind, if you're purchasing third-party data, you need to ensure you're getting regular updates or data can become stale quickly. It also matters to connect data for the target account at the site-location level rather than the headquarters or domain. Knowing which site location the buying signal is coming from is key for a precise retargeting effort.

COMPANY AND CONTACT DATA

Information about the companies you want to target is foundational to creating and refining your lists. It's important to stay on top of things like:

- Current roles and titles
- Company hierarchies and linkages
- Financial reports
- Sales and acquisitions
- Legal filings

This kind of information can often be acquired from public records, but you may not want to do the work yourself. Third-party data vendors like Dun & Bradstreet can do the job for you and provide business data to help build your account list. For example, the [Dun & Bradstreet Data Cloud](#) includes records on hundreds of millions of companies around the world and is updated frequently, plus the data is regularly cleansed to weed out duplicates.

TECHNOGRAPHIC DATA

The technology in use at an account or site location can provide great insight into the account's current situation and needs. There could be complementary, competitive, or dependent technology platforms that will empower your targeting strategy. By identifying what technology a target already uses, you can also see where your solution might fit into the picture.

USING AI

Looking for insights from the first-party data you already have is probably the best way to identify the next big customer. This is your intellectual property and can give you a strategic advantage when used effectively.

When you feed customer attributes plus purchase history and usage trends into an AI-driven platform, you can produce propensity scores to identify target accounts that fit identified profiles. A propensity score is another piece of the puzzle that helps you understand when an account is more likely or less likely to be in the market for your product or solutions. You likely want to target the accounts with the highest propensity scores with your ABM programs.

UNIFYING YOUR DATA WITH A CDP

In the past bringing all this data together and housing it in a single location was a big challenge, since the data was coming from so many disparate internal and external sources.

A customer data platform or CDP solves this problem at the core. It brings the relevant enterprise data together to create a unified system of record for both account and customer information. As such, a CDP is central to a data-driven ABM strategy.

Target with Precision

Targeting across multiple channels is the norm today and requires different data sets to reach audience through each channel. Omnichannel engagement is the Holy Grail, where a journey is orchestrated across every channel to continue the conversation or messaging.

You may start with an ad or social media post that drives to content on your website where someone can fill out a form that is then followed up with a nurture email or sales

outreach. Each step is designed to guide the buyer on their journey to purchasing your product or solution.



But you can't orchestrate a journey without deep understanding of your buyers. You have to know where, when, and how to engage them. The kind of data discussed in the previous chapter can help you gain this understanding and precisely target your audience in the channels they're most likely to inhabit and be receptive to your messages.

The well-written and visually engaging content you produce needs to be promoted in channels where your buyers will see it, or your ABM program will fall flat. Again, data can guide you to understand where and how your buyers use different channels so that you can take an omnichannel approach.

For example, you might be able to learn from third-party data that people with the attributes you desire tend to frequent LinkedIn during certain hours, so you'd want to schedule posts during those hours. Or they may be more likely to open marketing emails on certain days and at certain times, so you can plan those sends based on that data.

A few questions to ask here:

- Where do my stakeholders spend their time online?
- What is their mindset when using different channels?
- Where are you likely to reach them when they're in-market?

A good best practice is to be thoughtful about how you use each channel and consider quality over quantity when engaging your buyers. Too many messages, whether it's emails that are

too frequent or bombarding your target with ads on LinkedIn, can backfire and turn your buyer away.

Precision Targeting at Scale

Here are some tips for targeting in particular channels, although ABM is most effective when you use the right mix for your target audience.

PROGRAMMATIC ADS

It's a bit of a paradox. If you ask the average person what they think about online ads, they may describe them as intrusive. But the fact is that ads still drive a significant part of the buyer journey – when ads are relevant and targeted.

When thinking about ads as a part of your ABM program, start by building a segment of your target accounts using digital identifiers, such as cookies or device information. Here, a partner who can build the segments at the company site location, leveraging a unique business identifier, like a Dun & Bradstreet D-U-N-S® Number, can be beneficial.

You can expand to multiple locations using company hierarchy (for example, parent company and subsidiaries) as another dimension. Then narrow down to the decision headquarters and the site locations where buying signals originate. Overlay persona data (such as job function and seniority) to further narrow it down to a smaller audience within the target accounts.





You can go wide (multiple site locations) and deep (specific persona and decision-making locations) with precise targeting and less waste.

Now, install this segment into your digital-marketing platform (DMP) or your demand-side platform (DSP) for campaign trafficking. Leverage the people-based targeting capability of DMPs for three key purposes.

SOCIAL MEDIA

Social media posts and advertising can be an effective way to reach buyers. Most people have some kind of social media account, and likely more than one. Your B2B buyer likely uses LinkedIn and may also follow brands on Twitter or Facebook.

Your buyer may also be posting about the actual challenges they face in their day-to-day work and the problems they're trying to solve.

This kind of information can be invaluable in aiding your understanding of what your buyer is thinking, feeling, and doing in their journey.

You can like or follow your buyer's accounts, like and comment on posts, and message them directly to engage with them. However, be thoughtful in how you use social media channels to contact your buyer. Relationships are a key part of social media, and trying to sell to someone through social media before you develop a relationship can feel "spammy" and turn your buyer off.

EMAIL

Email remains one of the most effective tools at a marketer's fingertips. The number of email accounts globally continues to rise, and email presents an opportunity to speak directly and personally to your buyer. A concise email

that is relevant to your buyer's needs can be attention-grabbing and provide excellent ROI.

However, as with social media, it's important to strike the right balance. Too many email touches can drive a buyer to unsubscribe. Too much personalization too early, like using someone's first name in a first touch, can feel creepy and intrusive.

When you're ready to run your email program, you can load your ABM segments and relevant data into your marketing automation platform, or MAP, to start your targeted campaign. If you already have a CDP in place, that should ease this process; it should have native integration into your MAP.

Once this data is in the MAP, you have flexibility to further break it down into smaller logical segments, match content to them, and set up always-on nurture campaigns. Propensity

scores should be continuously updated to move accounts through buying stages based on engagement across all channels.

This takes lead scoring beyond just email opens and clicks. ABM propensity scoring includes:

- intent (first- and third-party data),
- behavioral (ad clicks, page views, email clicks, offline interaction),
- and profile data.

Account scoring is an integral part of ABM. You can roll up all the known and unknown contact engagement data to score the account and then make the scores available across all channels. Move them through the buyer's journey based on score changes. Then, orchestrate campaigns that respond to these scores, delivering the right content at the right time.

Personalize Customer Engagements

As we mentioned already, there's so much digital noise and your buyers only have so much attention to give before they get overwhelmed. So how do you grab their attention and keep it? The answer comes from buyers themselves. They want personalization.





As buying journeys have shifted to being almost entirely online, buyers are telling us they want companies to show them content that is relevant to them.

Instapage compiled some [relevant statistics](#) about personalization:

- 51% of buyers expect companies to anticipate their needs and make relevant suggestions.
- 74% of buyers feel frustrated when companies don't personalize web content.
- 63% of Millennials and 58% of Gen Xers say they will hand over their data for personalized offers.

These numbers pretty clearly say that personalization is the way to your buyers' hearts—and wallets. But it's easy to say, "personalize content and offerings." The trickier part is knowing how to do it successfully.

Think about the journey your buyer will take through your ABM program. They may start with an ad, social post, or email and end up on your website. It'll be imperative to optimize your landing pages—really, your entire website—to increase engagement and drive conversion. If a visitor follows a link from your ad, social media, or email but doesn't see anything interesting or relevant, they'll quickly bounce. And then you've lost an opportunity.

Some key things to think about when crafting your personalization strategy are similar to what you'll have planned for your ABM strategy:

- Understand your goals—what do you want your buyers to think, feel, and do?
- Know your customer—your ideal customer profile and intent data can help you understand what kind of messages and topics to deliver to your target buyer
- Build precise, targeted audience segments—personalization can lose its impact and value if you cast your net too widely and speak too broadly in an attempt to reel in every possible fish

It also matters to strike a balance between personalization and privacy. Yes, people are willing to sacrifice some degree of online privacy for relevant content and offers, but when you show that you know too much about a buyer and their preferences, it can feel creepy.

It's going to be important for all your teams to align on a data and privacy strategy. Know what kind of data you'll be collecting, where you'll be collecting it from, and how you'll be using it about your visitors. Set rules about data use and privacy and communicate clear

Your Visitor Profile

The foundation to your personalization efforts will be your data-driven visitor profile. You can build this using known contacts and third-party data, as well as your visitor's company data. It is generally understood that only 2% – 5% of website visitors are known, meaning the vast majority, 95% – 98%, are anonymous.

You may uncover your visitor's identity with a cookie, session variable, or local storage when a form gets submitted (or logs in), or the data may be pushed from email to the page when the visitor clicks through from a link.

A tool like Dun & Bradstreet's Visitor Intelligence can also help unmask anonymous website visitors so that you can deliver relevant personalized offers. Third-party anonymous visitor identification services can identify a visitor to a site based on their IP address and/or cookie. If you're not doing it already, I'd highly encourage you to explore this as it will give a massive boost to your visitor identity data and help you scale your personalization efforts.

Some other types of data that may help you deliver personalized web experiences can include:

CONTEXTUAL DATA

The page a visitor is on can provide a wealth of information—provided the page is tagged with the right keywords—like persona, product category, and content type.

BEHAVIORAL DATA

Behavioral data can provide the same wealth of information as contextual data by looking at all the pages the visitor has consumed during current and previous sessions.

INTENT DATA

Intent data can provide insight into what a visitor does outside of your brand engagement channels. It sheds light on whether the account is actively engaged in content that would signal that they're in market for a specific product or service. Having access to this data point in real-time as the visitor engages on your website is crucial if you want to take advantage of hyper-personalization.

Your Content

Content remains king. But there is so much content today that information overload and choice paralysis are real problems for pretty much everyone. The challenge for sales and marketing teams is cutting through all of that noise to be seen and heard. How do you provide the right content to the right audience at the right time? Without a solid content strategy, great content or more content is not going to deliver results.

What you say is just as important—perhaps more so—than when and where you say it. Your content and message have to be relevant to your target account. It should speak with empathy to a problem, need, or desire they have—and how your solution offers value



to them. The “what’s in it for me” value proposition should always be front and center.

Once more, data can help you decide the right things to say and really tighten your messaging to the segments you defined. In particular, intent data can help tell you what your buyers are interested in and searching for so that you can speak to their needs. You can match offers to their buyer journey stage or industry, for example.

The goal is to arrive at content aligned to the right topics or the products and services you sell. If you have a ton of content, an important step is to tag the content appropriately, so it can be used for targeting. It also sends the right intent signal back.

Conduct an audit to ensure you have content that speaks to the right persona and matters to the right target account. Start with a list of target account profiles (country, company size/revenue, and industry). Then create content to cater to smaller segments. Without having content for specific audiences (you can even customize it for each specific account), personalization becomes stale and meaningless.

Chances are, you already have data on the content that is working and delivering results. Don’t ignore this valuable insight hidden within your analytics platform. Consider which content has a high engagement rate for your target audience. You may then have to break it down further based on the content type and buying

stage. Feed this insight back to your content team, so they focus their efforts on building and optimizing content that is working.

Higher engagement improves the chance for increased conversion. This is a critical step in the B2B buying journey. This is where anonymous engagement becomes a known contact, prospect, or lead. There are two steps to conversion when a visitor is already on a page. First, your personalization strategy must not only drive higher engagement, but drive more visitors to a gated asset. You must also present an asset compelling enough for the visitor to click and fill out a form with their professional information in return for the content. If your strategy is on track, the gated asset is presented at the right time to the right audience when he or she is ready to make the next move.

Web content isn’t the only kind of content ripe for personalization. When you’re planning a personalized experience, all of these can—and probably should—include some degree of personalization for your buyer:

- Landing pages
- Content hubs
- Ads
- Nurture emails
- Events
- Prefilled forms

From an ABM perspective, all your effort to bring in visitors (whether influencers or decision makers) from the right accounts and presenting them with the right content will most likely lead to increased form loads, not necessarily form conversions. There is no guarantee someone who made it to the form will submit the form.

Eliminating friction on the lead form can help. Here are a few things you can do to improve form conversion. Be sure to keep your security, privacy, and legal teams involved so that your forms are legally compliant and you are actively protecting the data you collect.

1. Make the form shorter and get rich data. Collect minimal information on each form—consider it progressive profiling. The primary goal of the form is to collect contact information and allow the prospect to consume and/or download the content.
2. Although there are many different opinions on this, it’s recommended to shorten the form to collect only email, company name, and country. There are many things you can do to augment and enrich this data for better targeting, lead qualification, and routing.
3. Implement a form fill (smart form) service to match the visitor submitted data real-time on the form and augment with all company level (firmographic) information.
4. Follow that up with a solution that can interact directly with your marketing

automation system to match, append, and cleanse your marketing contacts. When you have these services in place, you not only improve your form conversion, but you also collect richer data and keep it clean on an-ongoing basis. This achieves better data governance all the way from data capture to storage and maintenance.

5. Finish with a progressive profiling process for contacts who couldn’t be matched and augmented through the form fill and data enrichment services. Make it part of the drip campaign to progressively ask for another piece of information with every engagement. Keep in mind, progressive profiling doesn’t require the visitor to authenticate every time; marketing automation or first party cookies can keep track of the return visitor and present them with a refreshed form to capture only the missing information.

Now you have a comprehensive lead gen (or conversion) strategy, that not only improves form conversion (to get more leads with the same effort), but also cleans and adds rich marketing data to drive precise retargeting, eliminate waste, enhance lead qualification, and enable lead routing.

Getting and Closing the Deal

Here's where we put in another plug for the idea that ABM isn't just for marketing. It's an entire revenue-driving strategy that should also include thoughtful planning of your sales experience. When you're getting that alignment between your ops, marketing, sales, and other teams, part of the process should be thinking through what happens at every stage of the journey from awareness to purchase—and beyond.





Planning Your Experience from Marketing to Sales

You should have already asked the key questions up front, but now is a good time to revisit your answers.

- Do your marketing and sales teams have shared goals?
- Have you agreed on how you will measure success?
- Do you have the support from Ops teams that you need?
- Do you have the right tools in place to deliver a seamless experience?

Making the Handoff

With your accounts identified, audiences targeted, personalization planned, channels identified, and content created, marketing should be well-positioned to start bringing in high-value leads. But it's important to also plan for what happens after those leads are handed over from marketing to sales.

That plan should account for what happens to a lead at each point of the journey:

- What qualifies as a good lead? Are marketing and sales using the same definitions?
- How will marketing deliver leads to sales?
- What will sales do with marketing qualified leads? How will you track and progress opportunities?

With a fully planned account-based experience, when the marketing-qualified lead (MQL) gets into the hands of a seller, the seller should have all the relevant insights and account intelligence to have a meaningful conversation. But what does that mean? In a nutshell, it means bringing all the engagement data collected so far in the buyer's journey and making it available to the seller within your tech stack.

When sellers engage with the prospect for the first time, they should have a full understanding of the prospect's journey and touchpoints so far, including:

- The content consumed across channels by the lead and other known and unknown individuals within that account who may influence buying
- The propensity score generated by your own data team or AI partner

Agree on a data management strategy, set up the flow between your marketing channels and technology platforms, and establish data-driven

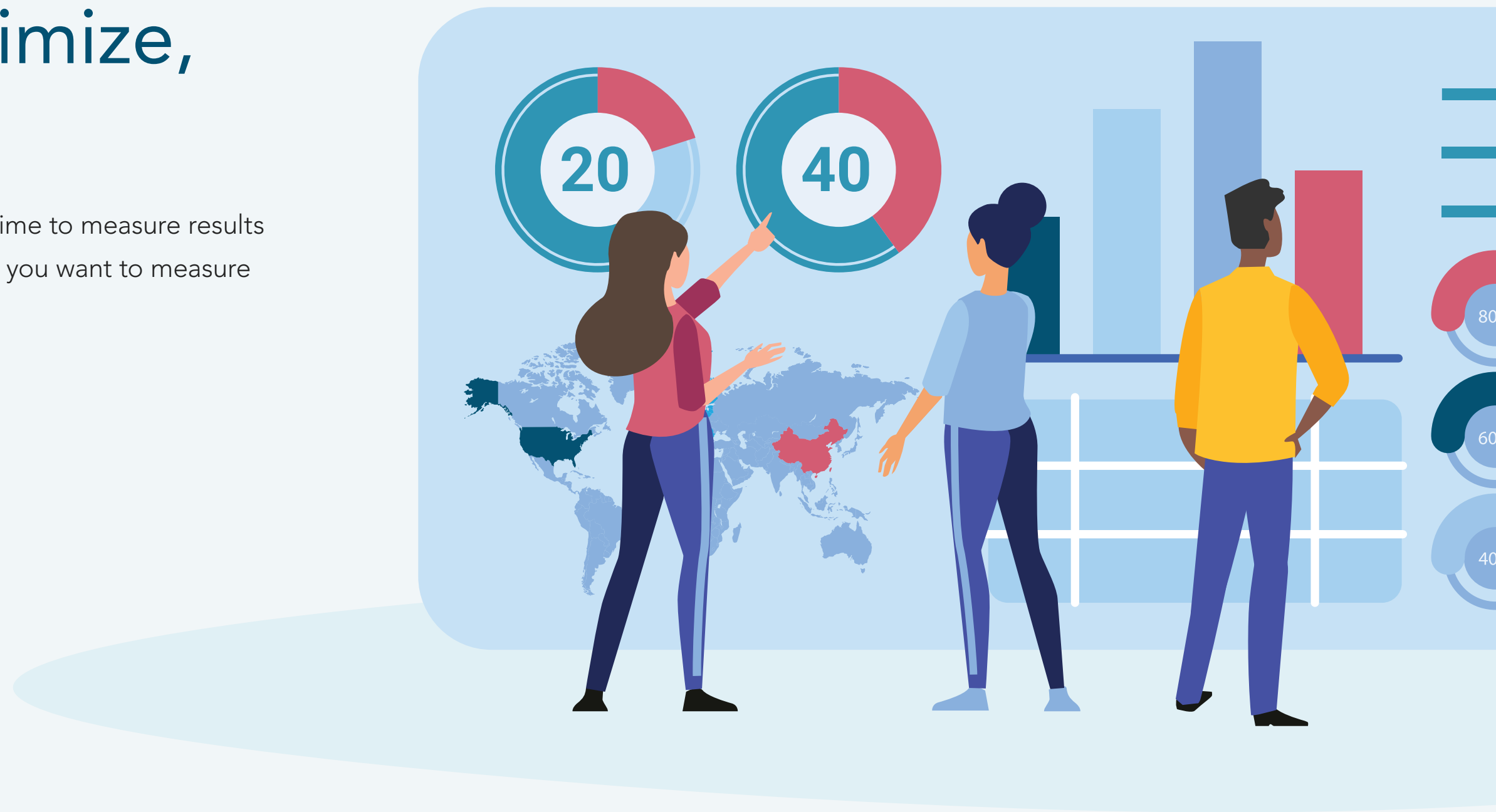
practices for measurement and attribution.

Encourage your Ops team(s) to make sure your CRM data is cleansed and enriched, and have a unique account or business identifier, so when you route the MQL, it gets matched with the right account and routed to the right seller. For example, the [Dun & Bradstreet D-U-N-S® Number](#) is a commonly used identifier that distinguishes a business as being unique from any other in the Dun & Bradstreet Data Cloud. Having a common identifier that lives and flows throughout your platforms and channels helps ensure you are targeting the right companies with your sales and marketing and is critical for measuring your success.

It also can be beneficial to have a single solution, like a RevTech platform, to stitch your sales and marketing stack together. RevTech can also help you maintain the quality of your first-party data and leverage third-party data and rich analytics to make omnichannel ABM a reality for your organization.

Measure, Optimize, Repeat

Once your campaigns are activated, it's time to measure results using the KPIs you set. Decide how often you want to measure and report your results.



Depending on how you defined success when you started to strategize your program, you should be able to answer questions such as:

- Did my campaign achieve the results I wanted?
- Did my buyers engage with the content and move down the funnel?
- Were opportunities generated?
- Did I get the right deals into my pipeline?
- Did my campaign generate revenue?

With these answers, backed by data, you can make informed decisions about how to optimize your campaigns to improve reach or address any changing priorities.

You can measure every single action in digital marketing. However, what every revenue team wants to know is this: What is the program's impact on sales and revenue? Here are some metrics you can track and report to answer that question.

- Targetable accounts
- Impressions delivered
- Ad clicks
- Web-engaged accounts (include anonymous visitors resolved to accounts)

- Leads & nurtured accounts
- Accounts with active opportunities — revenue and number of accounts
- Deals lost — revenue and number of accounts
- Opportunities rolled over to next quarter
- Deals won — revenue and number of accounts

These metrics can help to identify what's working and what's not, and where any bottleneck is in the buyer's journey. Perhaps most importantly, they will also help answer the burning question—how is my ABM strategy affecting revenue?

Your ABM program is only as strong as the weakest link in the buyer's journey. Measure every stage in the process, and every campaign for its effectiveness. Apply what you learn, optimize, and iterate on the process. This should be a closed-loop process to streamline the buyer's journey and eliminate any bottlenecks in the process of converting prospects from awareness to purchase.



ABM Tools

To execute a true omnichannel ABM program, you're likely using multiple platforms stacked together, depending on the different channels in your mix.



In a typical marketing organization, there are multiple platforms and systems to deal with, including any or all of the following:

- Customer management system (CMS)
- Personalization platform
- Content management system
- Marketing automation platform (MAP) for email, mobile, outbound calling, direct mail, campaign, and lead management
- Tag management system
- Web analytics
- Customer relationship management (CRM)
- Multi-touch attribution platform
- Data management platform (DMP)
- Multiple demand-side platforms (DSPs) to execute search, display, video, TV, and social media campaigns

Adding even more complexity, some organizations have multiples of the same platform types—even multiple instances of the same platform!—for different business units. Even today, so many organizations aim to execute account-based marketing across channels, yet end up with multi-channel campaigns and not an omnichannel strategy because of how their work is fragmented across platforms.

If your marketing stack has some of the platforms and systems listed earlier, your next focus should be connecting your entire technology stack and enabling each element to operate from a single source of data. This is a challenging task that requires multiple stakeholders working together with a common understanding of the objective, benefits, different pieces of the puzzle, and how it must be put together to build a single, effective ABM stack.

What is RevTech?

The biggest challenge marketers face is how to execute a single ABM campaign across all these channels, leveraging so many individual systems. The need for a single platform that can interface with all of them is obvious — and the emergence of RevTech is starting to provide that answer.

RevTech is a new crop of tools designed for marketing and sales teams to coordinate and collaborate on end-to-end account-based experiences as revenue teams aligned for a single purpose: landing more deals. With the right RevTech tool, a unified revenue team can combine first- and third-party data for a more comprehensive view of buyers, target the right audiences for campaigns and sales plays, activate their brand messaging across channels, and measure their buyers' journeys for continuous optimization.

RevTech can also help marketing and sales teams cope with the overwhelming proliferation of tools on the market today. So many of these tools just create silos for marketing and sales teams—the tools trap them in one company's proprietary tech for one aspect of their marketing or sales, and a different piece of proprietary tech for another.

RevTech deals with this fragmentation by connecting these different tools together into one unified ecosystem. Combine the customer data you gather with the data you've purchased from a vendor, segment and target your audiences, build personalized experiences, and activate campaigns and sales plays all in one seamless workflow.

Dun & Bradstreet's answer to the need for RevTech is [Rev.Up ABX](#), an open platform that integrates with commonly used MarTech, AdTech, and SalesTech and powered by our industry-leading CDP to simplify ABM planning and activation.



CONCLUSION

What's the Future of ABM?

Simply put, the future of ABM is ABX, driven by RevTech.

ABM as a term might evolve, but this kind of strategy aimed at efficiently marketing and selling to high value accounts isn't going away. It's becoming the default and aligned marketing and sales teams—revenue teams—have to successfully build and scale these programs to stay competitive.

Ready to Rev.Up Your ABM?

D&B Rev.Up is the open RevTech platform that helps marketing, ops, and sales teams

- ✓ Activate and reach your ideal customer audiences efficiently and effectively
- ✓ Create engaging, personalized account-based experiences
- ✓ Reach buyers in the right channels and at the right times
- ✓ Measure performance for continuous optimization of your campaigns and programs

Watch a quick demo today.

[D&B Rev.Up ABX](#)

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