DEMANDBASE

THE ROI Lab

for Sellers

The Seller's Guides for Winning with Demandbase

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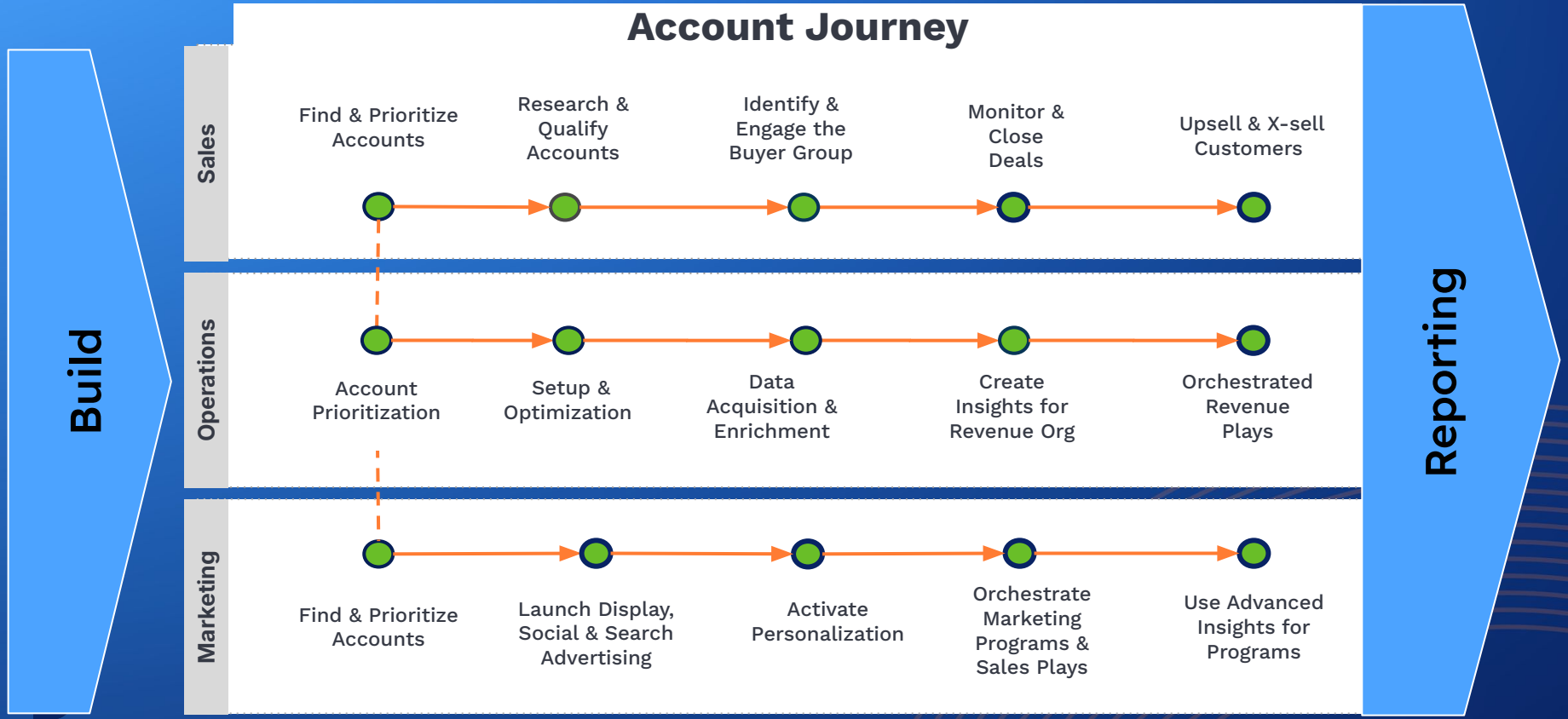
GTM Guidebook



Sales Workflow Topic	Playbook	Tech Stack	Role			
			Sales/SOPs Leadership	New Business Sales Rep	New Business xDR	Upsell/X-sell Rep or SDR
Find & Prioritize Accounts	ICP, Account Scoring & Tiering		x			
	List Build		x			
	Navigating Prescriptive Sales Dashboards			x	x	
	Building an Order of Operations		x			
Research & Qualify Accounts	Researching accounts using signals			x	x	x
	Understanding your buying group			x	x	x
	Enable team on research checklists		x			
Engage the Buying Group	Know Intent, Engagement & Communication History			x	x	x
	Strategy for Working Accounts			x	x	x
	Taking Action			x	x	x
	Effective Multi-threading			x	x	x
Monitor & Close Deals	Signals that show additional areas of interest		x	x		x
	Buyer Engagement			x		x
	Identifying competitive threats & red flags		x	x		x
Upsell and X-sell Accounts	Finding expansion opportunities		x			x
	Finding new buyers at existing accounts		x			x
	Identifying subsidiary engagement		x	x		x

Understanding Your Buying Group

How to understand your potential buying group

Who is the most engaged?

- What topics are they researching?
- Is there a pattern to what they are researching?

Is engagement from your buying group?

- Do you have engagement minutes with your buying group?
- Do you have engagement minutes from people who roll up into your buying group?

Is interest coming below the line or above the line?

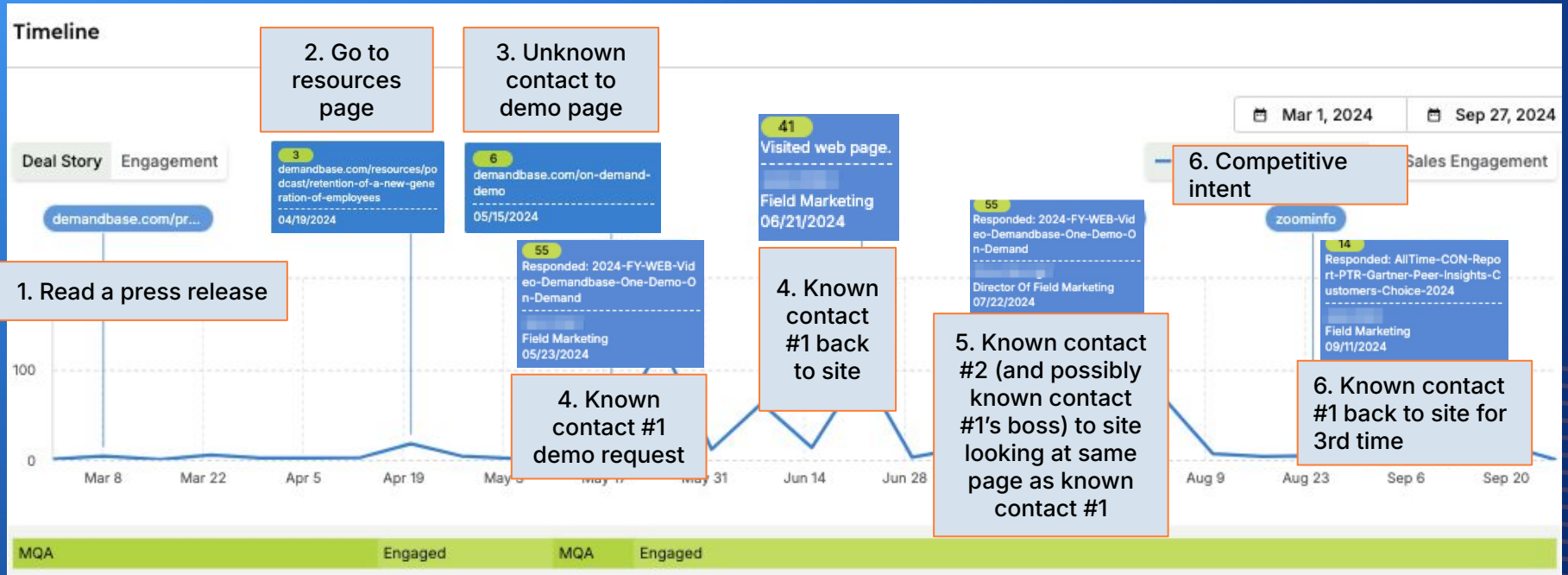
- The line = Director
  - Below are influencers and end users
  - Above are your decision makers and buyers
- Work below the line to gather rich insights about the account to be relevant to people above the line

What types of content are they looking at?

- Are they researching how to guides that are more educational about your product, industry or service?
- Are they researching why you as a partner (case studies, 3P analyst reports, why you over a competitor pages, demo pages/videos?

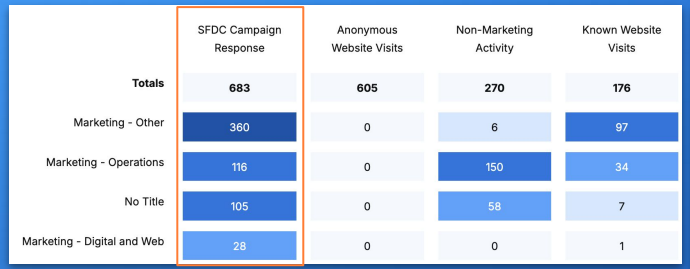
Timeline

Timeline is one of the most important features in viewing account activity with sales & marketing actions at your company



Understanding the history of engagement tells you the story of account interest. Here I can see several members of field marketing team are wanting to see demos of our product. You can go even deeper in activities section of heatmap (tutorial in next slides)

Heatmaps



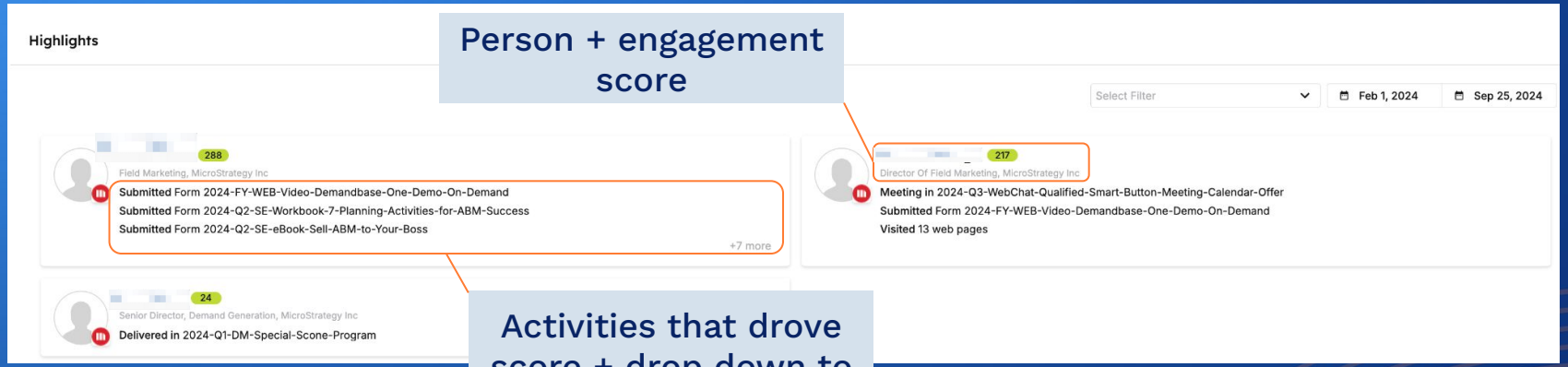
	SFDC Campaign Response	Anonymous Website Visits	Non-Marketing Activity	Known Website Visits
Totals	**683**	**605**	**270**	**176**
Marketing - Other	360	0	6	97
Marketing - Operations	116	0	150	34
No Title	105	0	58	7
Marketing - Digital and Web	28	0	0	1

1. Click on row/column you want to dive into. In this example, I want to see all persona engagement from SFDC campaigns (MQLs) over the past 6 months

2. Look for patterns:
   - People - are the same people coming back multiple times
   - Personas/teams via title - do we see a pattern emerging in people and/or teams interested in content that we should target
   - Topics via details - is the content they are looking at related to the same topic? Use this to select people + what to message about
   - Frequency + recency of activity via activity date - is it time to take action?

Highlights

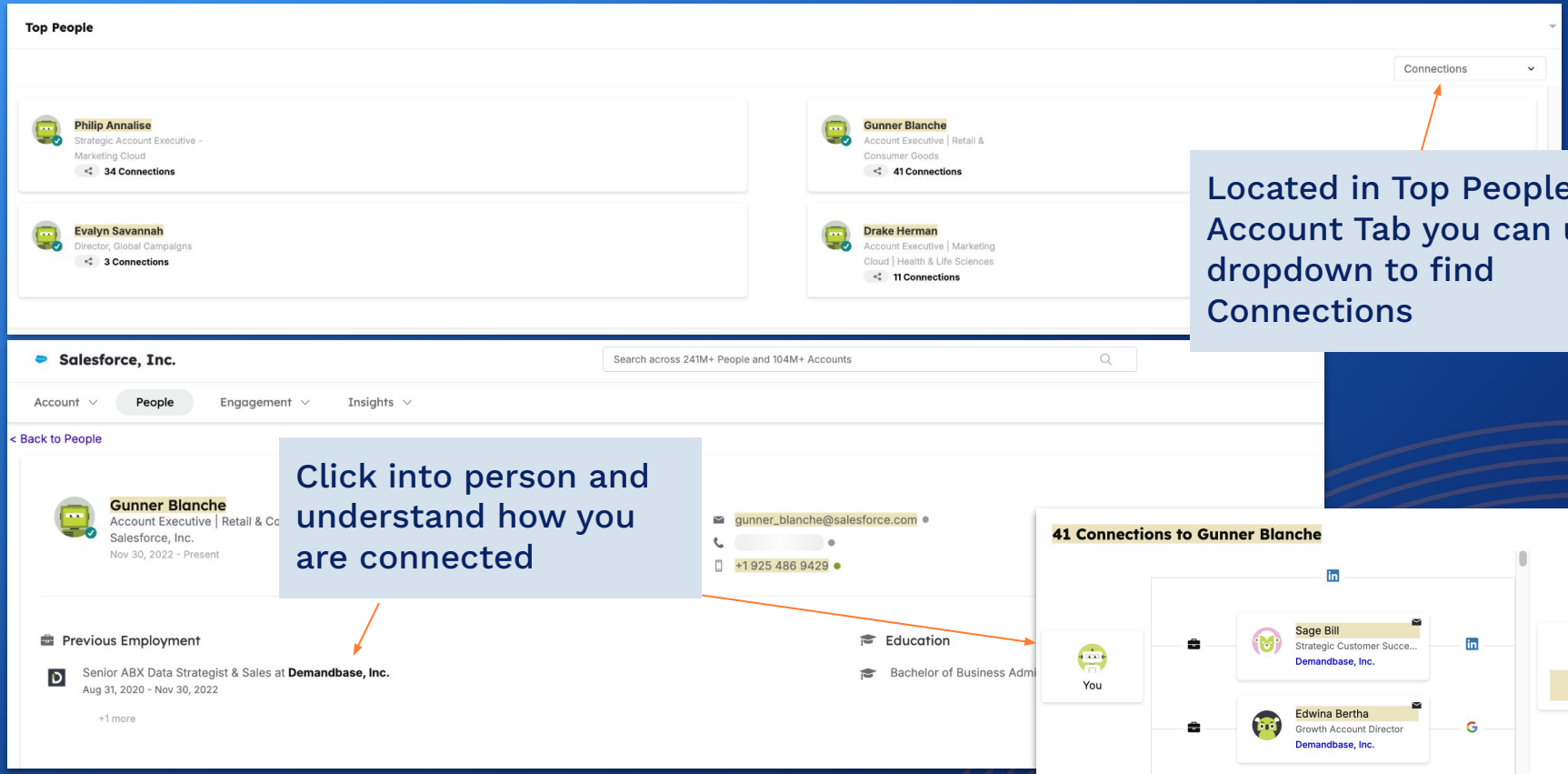
These are the top contacts via engagement score and the activities that have ranked them high in the scoring over the given time frame



Highlights are a good starting point at any account for who you should reach out to as they are the most engaged and you have insight into what their interest is

Connections

View your LinkedIn connections within Demandbase One for Sales

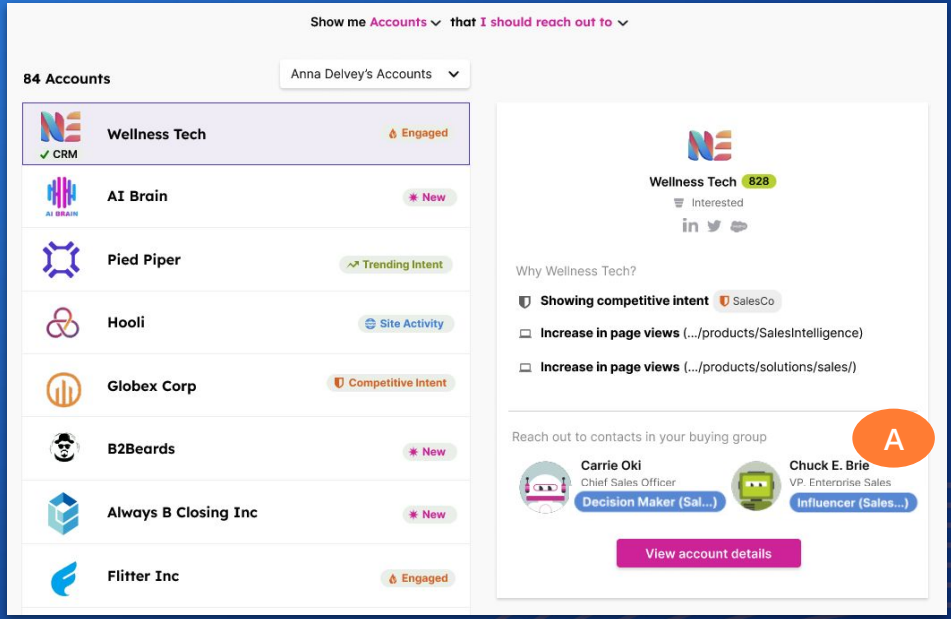


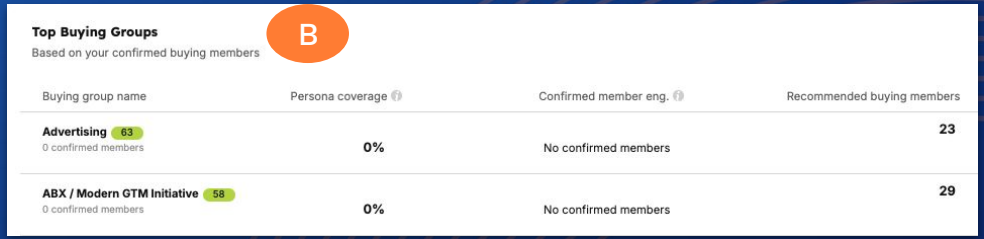
Buying Groups for Sales

One of the biggest challenges for sales in approaching accounts is knowing who the buying group is. Take the guesswork and manual process out of it, with Buying Groups for Sales

A Identify the right personas and buyer roles within a buying group

B Set-up multiple buying groups for different products or services, to help reps focus on the right buyers for the right solution

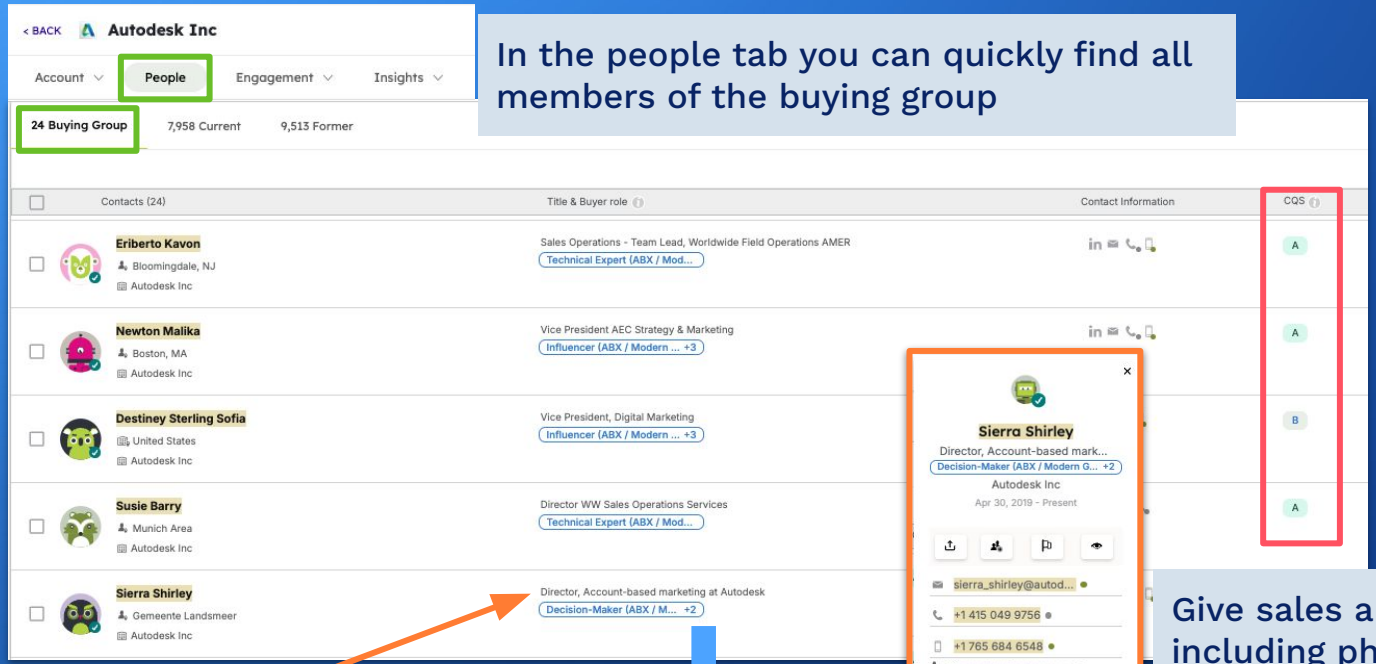


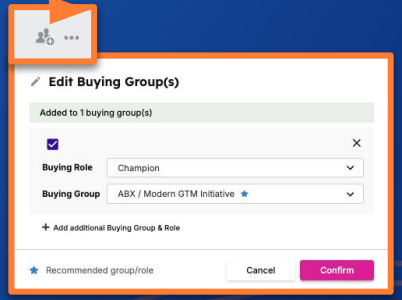


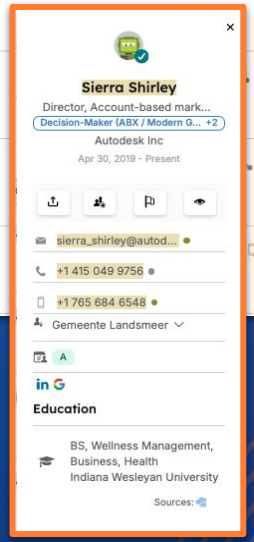
Buying Groups

In the people tab you can quickly find all members of the buying group

Allow sales to edit/add buying group members as they learn more about the account



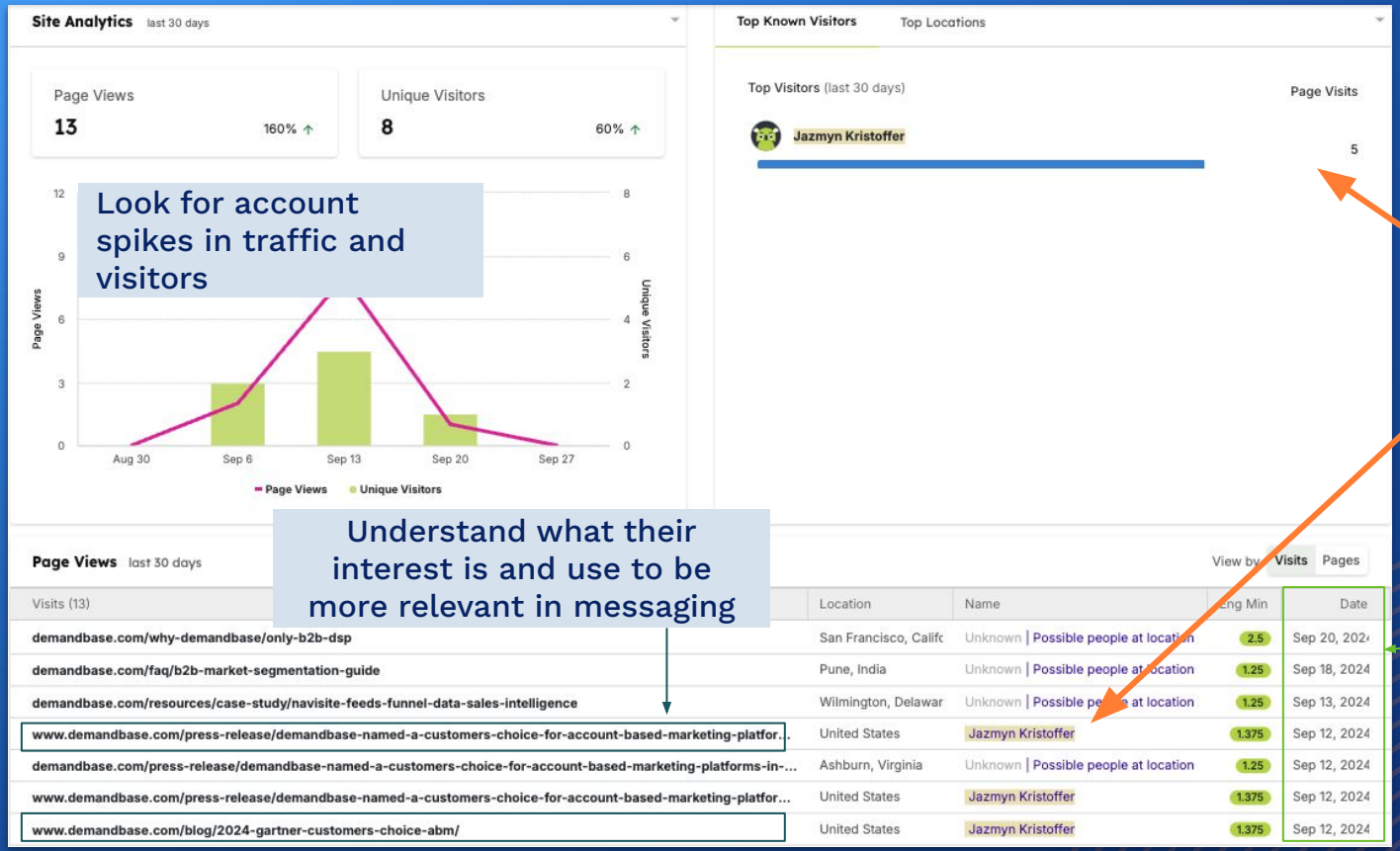




Broken down by title + buyer role

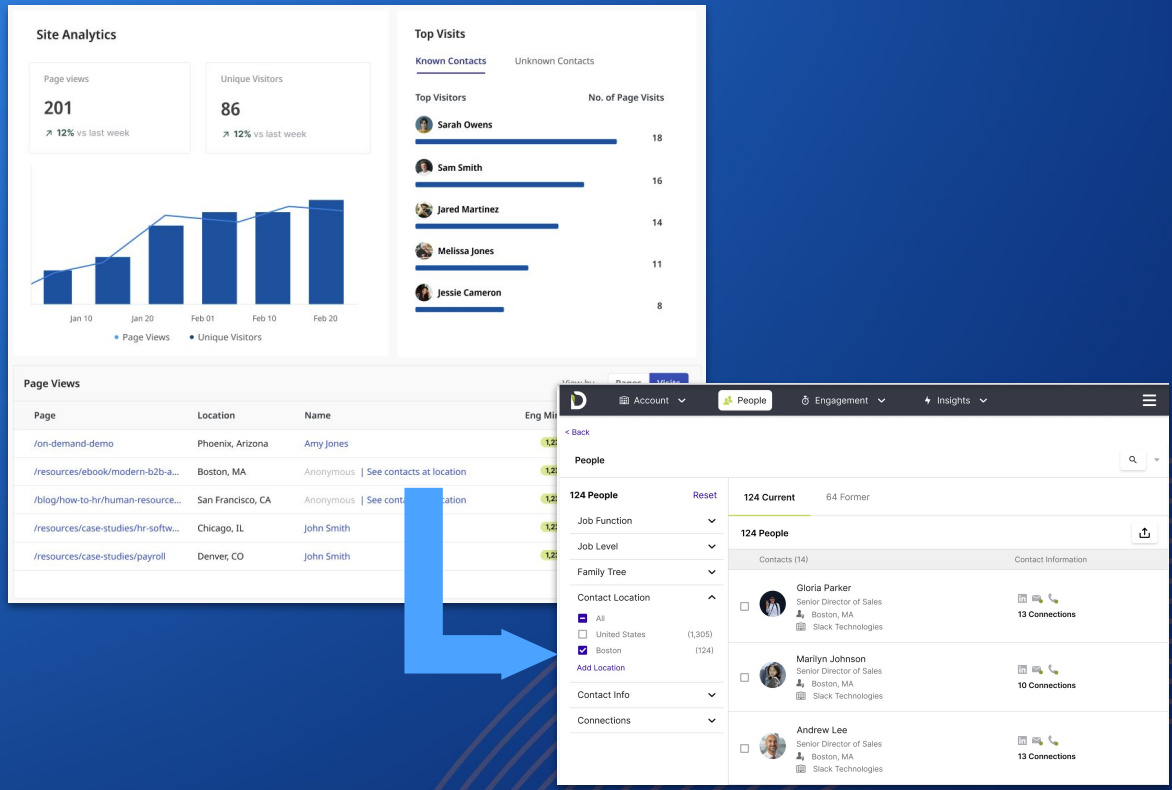
Give sales all relevant contact info including phone, mobile, email, LinkedIn profile + Contact Smart Scoring (A+--> C) to give reps an indication of the accuracy and recency of verified contact info.

Site Analytics - Known Visitors



Site Analytics - Identifying Unknown Visitors

- See site activity trends to identify when a target account is showing interest
- Easily identify top visited pages to understand what prospects care about
- View known contacts visiting the website and reach out to them (with context) immediately
- Get contact recommendations for anonymous site visitors



Finding Contacts in CRM

Build reports showing personas with engagement. Can be for single account, target persona or across a sales reps territory

Report: Contacts & Accounts

Visa Contacts with MEMs Last 90

Trend | Enable Field Editing | Add Chart

Total Records	Total Marketing Engagement Min…	Total Marketing Engagement Min…	Total Marketing Engagement Min…
8	220	655	900

Person level engagement scores

Demandbase Persona	Account Name	First Name	Last Name	Title	Email	Marketing Engagement Minutes (1 mo.)	Marketing Engagement Minutes (3 mo.)	Marketing Engagement Minutes (1 yr)
Marketing - DG and Field (1)	Visa Europe Limited	[redacted]	[redacted]	Senior campaign manager	[redacted]	44	44	44
Subtotal						44	44	44
Marketing - Digital and Web (1)	Visa Inc	[redacted]	[redacted]	Campaigns	[redacted]	6	6	100
Subtotal						6	6	100
Marketing - Operations (2)	Visa Inc	[redacted]	[redacted]	B2B Marketing Operations	[redacted]	0	33	143
	Visa Inc	[redacted]	[redacted]	Senior Director MarTech/Operations	[redacted]	34	366	366
Subtotal						34	399	509
Marketing - Other (3)	Visa Inc	[redacted]	[redacted]	Marketing Manager	[redacted]	5	10	51
	Visa Inc	[redacted]	[redacted]	Marketing Planning Manager	[redacted]	0	30	30
	Visa Inc	[redacted]	[redacted]	Marketing Lead	[redacted]	0	35	35
Subtotal						5	75	116
Other (1)	Visa Inc	[redacted]	[redacted]	Manager	[redacted]	131	131	131
Subtotal						131	131	131
Total (8)								

Anything with engagement in the last 30 days is a good starting point

Organized by persona

Report pulls in any account in parent account hierarchy

Engagement over a longer time frame (3 mo. -> 1 yr) can give you a sense of people at one point interested who you should stay in contact with. If you see engagement growing from 3 mos to 1 year, they are generally a good person to target (if they are still at the company)

Finding Contacts in CRM

1. Build an engaged personas report into a dashboard view
2. Separate reports by persona making it easier for reps to connect persona -> value prop
3. Look at communication history and engagement of that contact for relevance in messaging

INCLUDE ROWS MATCHING

1 AND 2 AND 3 AND 4 AND (5 OR 6)

1	Marketing Engagement Minutes (3 mo.) greater or equal 50
2	Account Name does not contain test.com, Forrester - Analyst, - partner, demandbase, placeholder
3	Demandbase Persona contains marketing - exec
4	Demandbase Journey Stage does not contain disqualified, opportunity
5	Product with the Most EngMins (1 mo) contains abx, sales, data, advertising
6	High Value Page Visits (3 mo.) not equal to ""

Engaged Marketing Execs

Account Name	Title	First Name	Last Name	Marketing Engagement Minutes (1 mo.) ↓	Product with the Most EngMins (1 mo)	Sales Touches (1 mo.)	Count of High Value Page Visits (1mo)
nCino	Chief Marketing Officer			241	None	2	14
The Meyers Printing Companies, Inc.	Fractional CMO			210	None	4	16
AVEVA US	Vice President, Demand Generation and Partner Marketing			106	None	6	1
Praxent	VP Growth			101	None	3	5
NWN Carousel	Director of Field Marketing			100	None	23	8
Cambria Company LLC	VP Creative Design			91	None	-	3
Intelex Technologies Inc.	Marketing VP			91	ABX	1	3
LPL Financial Holdings Inc.	VP, B2B Marketing Strategy			78	None	2	2
Stratasys	VP Global Marketing			69	None	7	2
Privacera, Inc.	Senior Vice President Marketing			68	None	3	2
Chili Pete	VP of Marketing			64	None	-	1

View Report (Engaged Mktg Exec - Impact)

Report Building Steps

Step 1. Contact engagement score
Step 2. Account Name filter out list (optional)
Step 3. Persona filter

Step 4. Journey Stage Filter
Step 5. Product with most engagement filter
Step 6. Account level high-value page visits

Report Layout

In columns of report, include contact level engagement, sales touches and number of high-value pages they have been to

Taking Action

Finding the right person based on interest

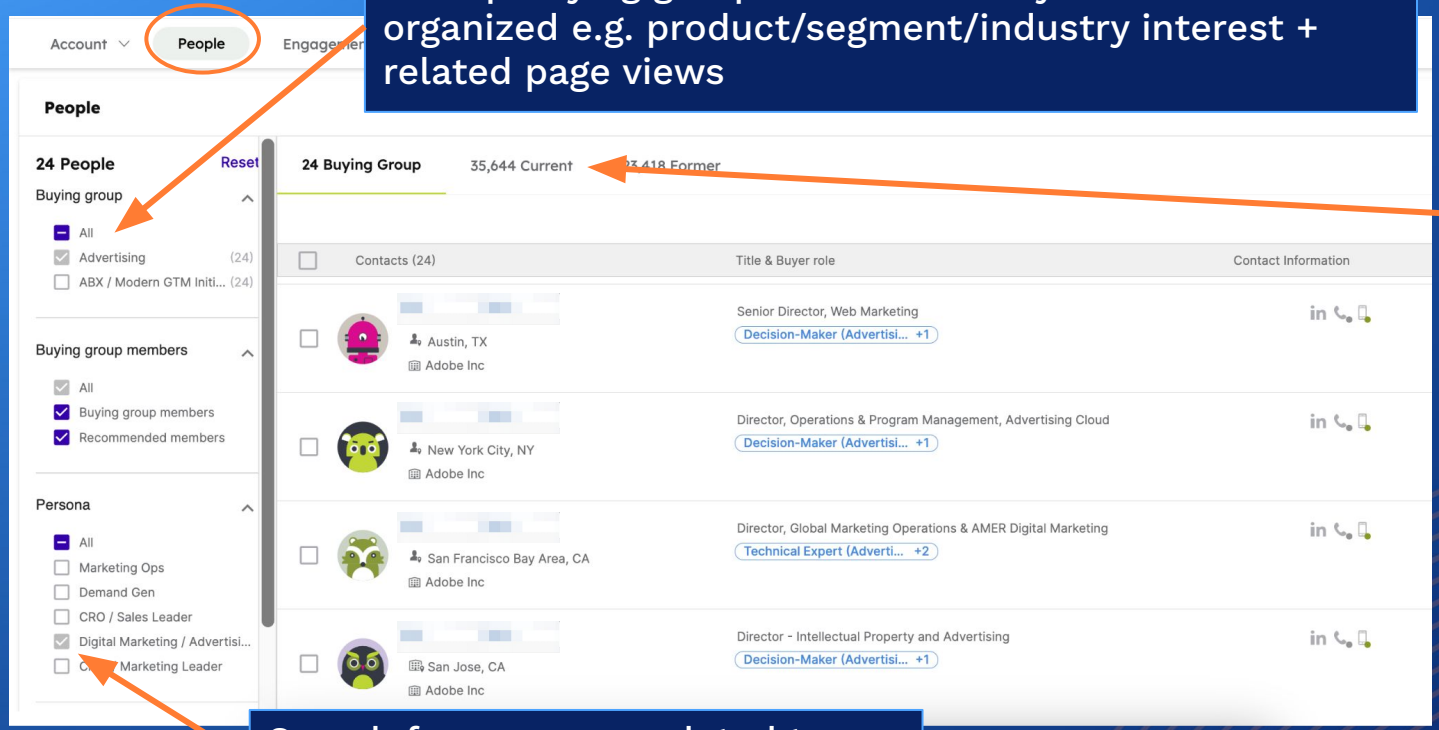
Using the Advertising interest, we can assume that the interest is from someone close to the Digital Marketing persona

Not only are they researching our advertising solution on our website, they are showing intent (3rd-party) for AdTech

Use buying group + persona to narrow contact list

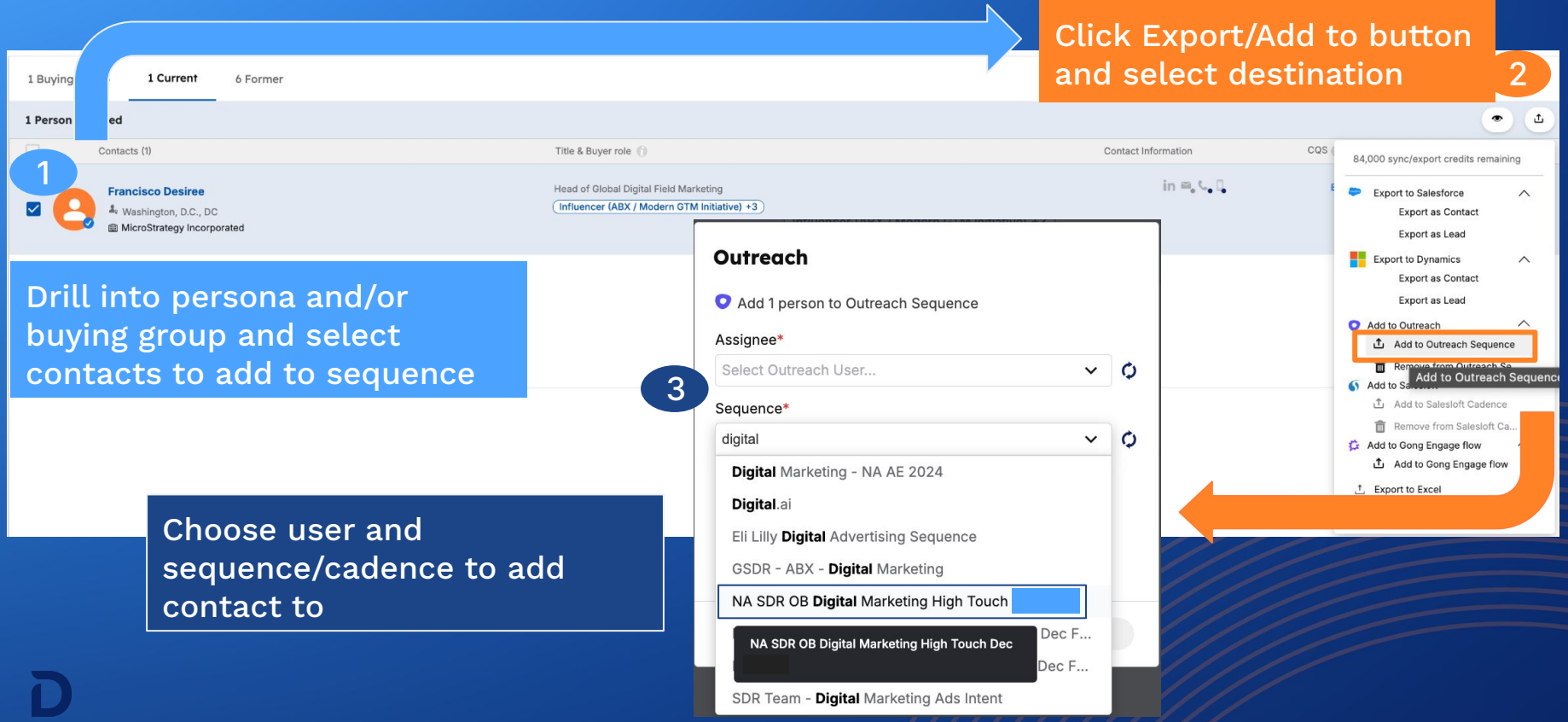
Set-up buying group based on how your sales team is organized e.g. product/segment/industry interest + related page views

Take list of 35k employees to 24 with the right list segmentation



Search for personas related to engagement

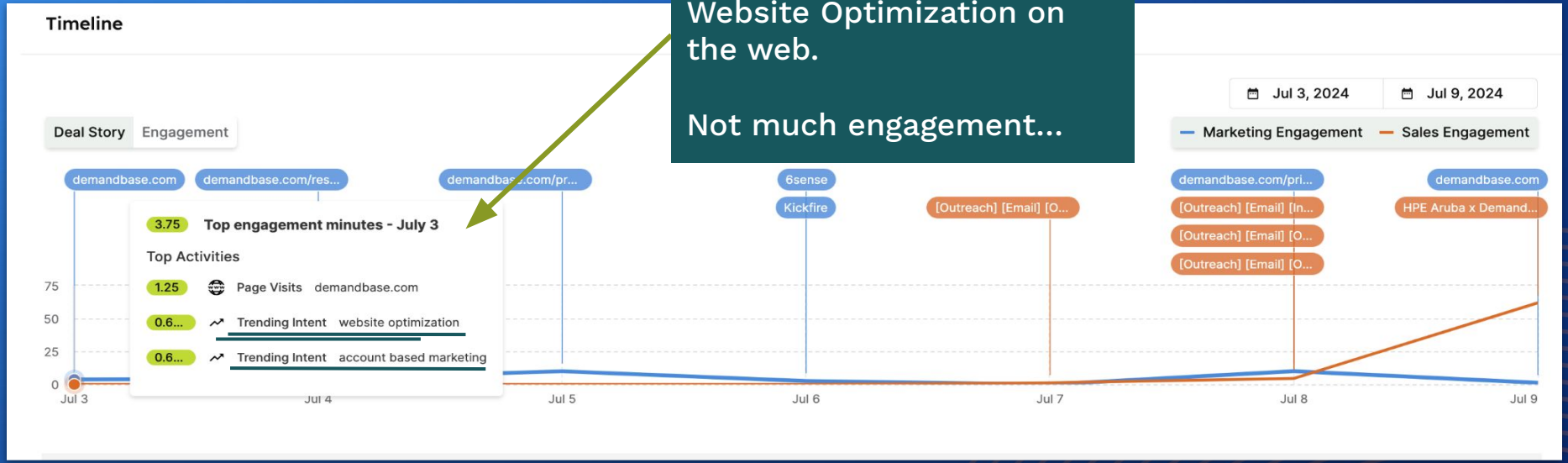
Use DB1S to Take Action in Sales Engagement



Example #2 - Using Insights for Relevancy

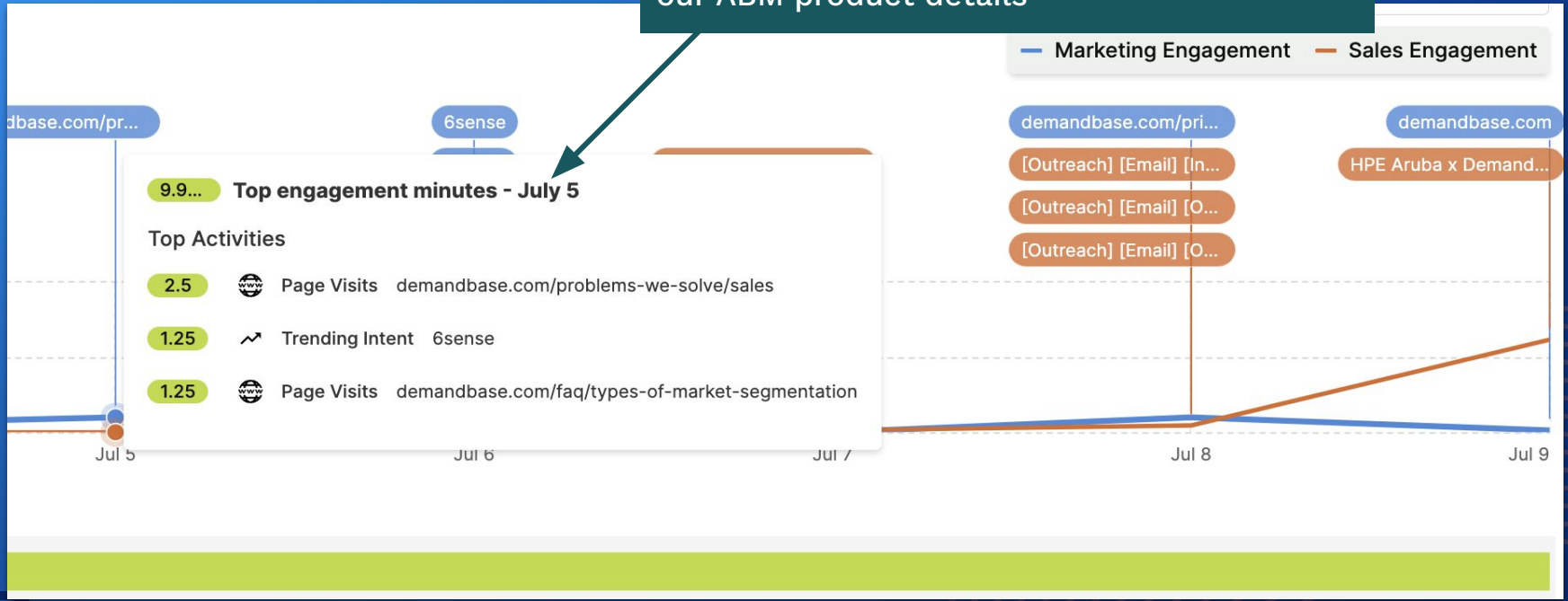
Newly visiting homepage, and researching ABM, and Website Optimization on the web.

Not much engagement...



Two days later...

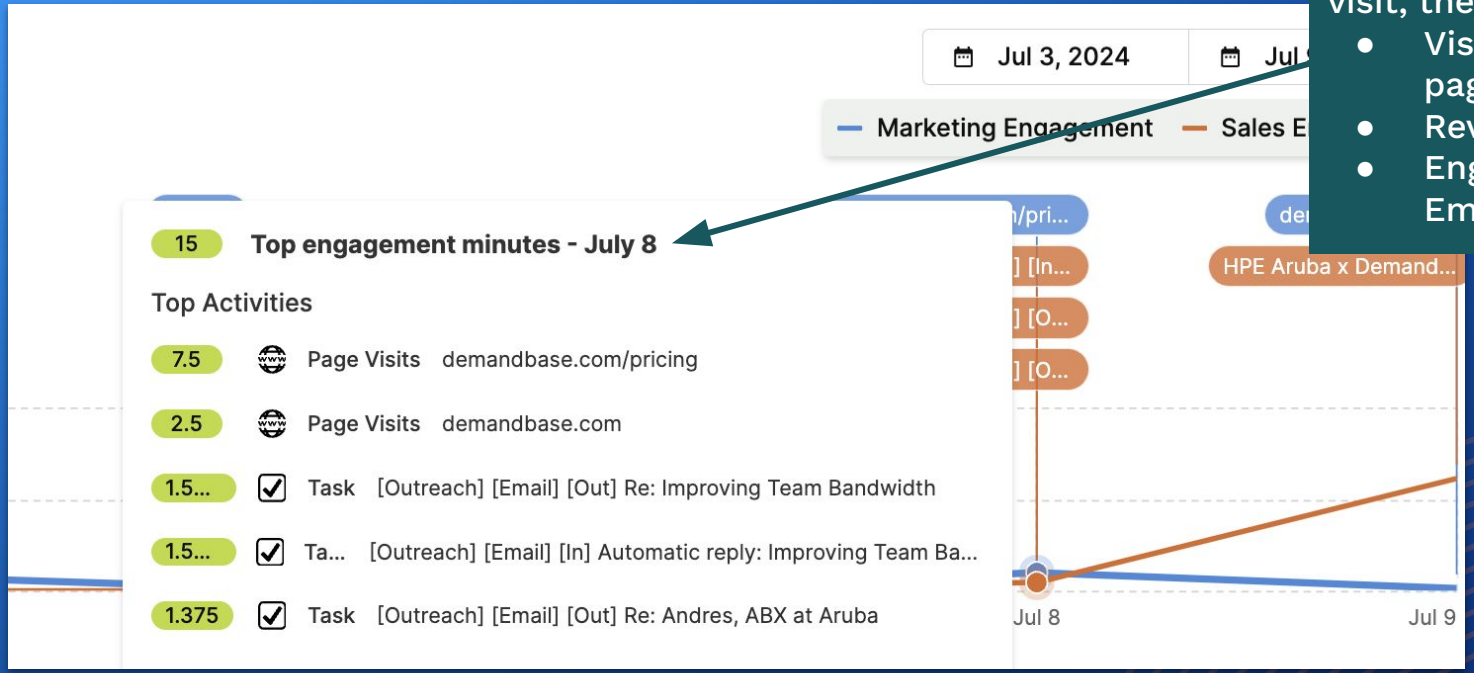
No sales rep has reached out yet, but now we know they are going past home page, researching our competitor, and looking at our ABM product details



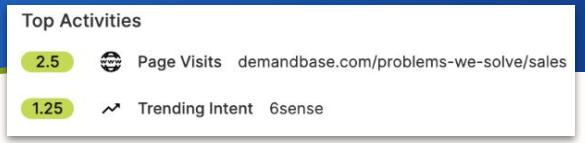
Begin outreach after web page visits...

After reaching out and **8 days** after initial home page visit, they are now;

- Visiting our pricing page
- Revisiting Homepage
- Engaging with Emails...



Get the Response!!!



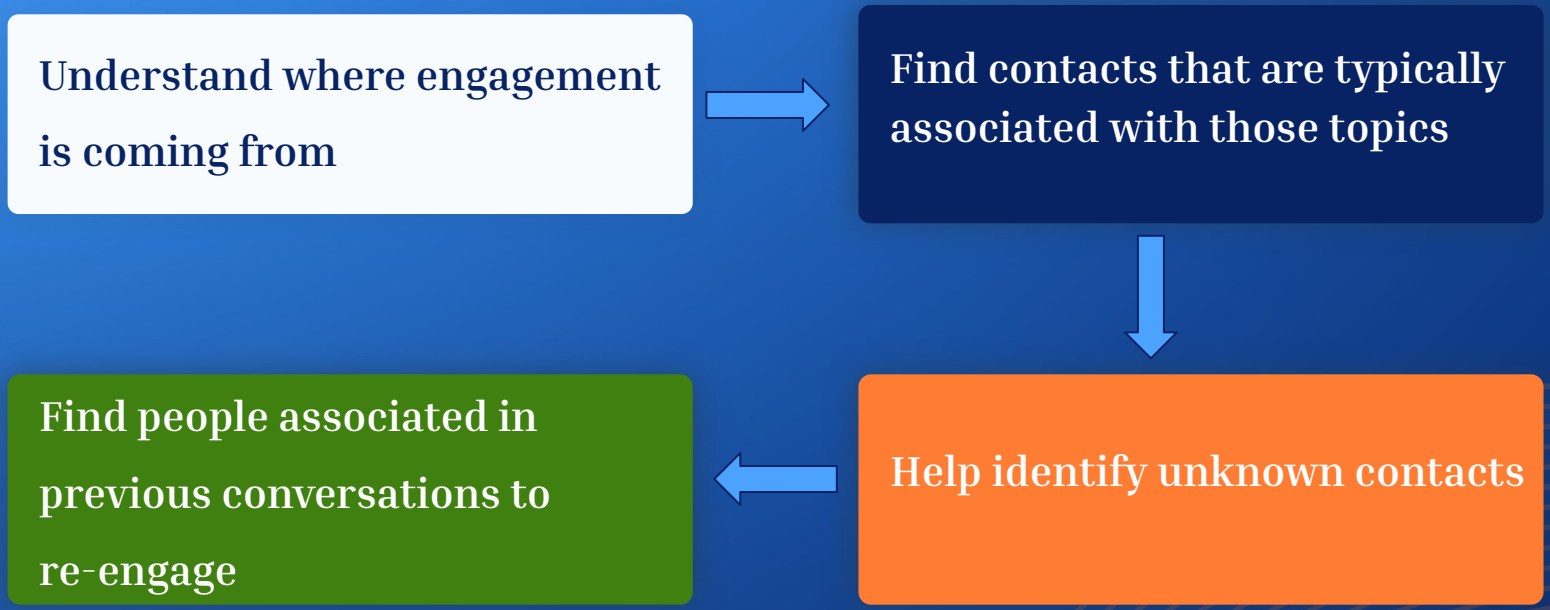
Hi Anthony and Destinee,

Thanks for reaching out. I would like to learn about the 6Sense and Demandbase differences.

I am available on these time slots, please feel free to send me an invite, and we can schedule 45 min.

Effective Multi-threading

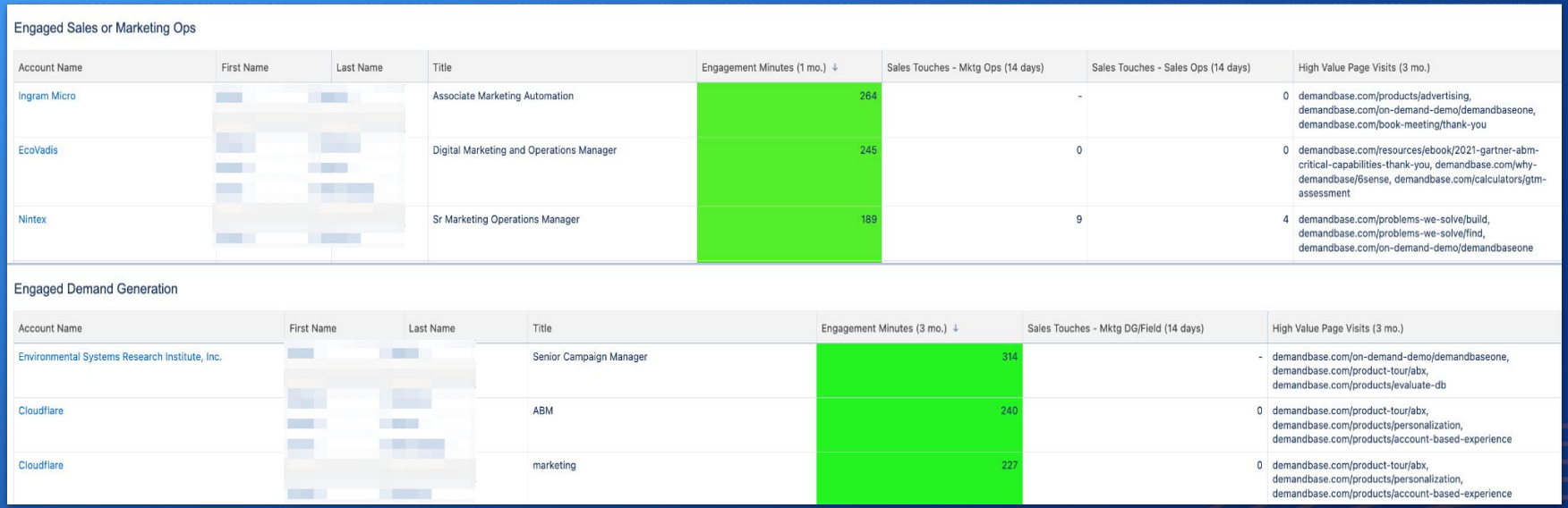
How Demandbase can help with Multi-threading



Heat Map

Understand where you have engagement across your buying group and the type of engagement it is

Engaged Target Personas by Sales Touches



Engaged Sales or Marketing Ops

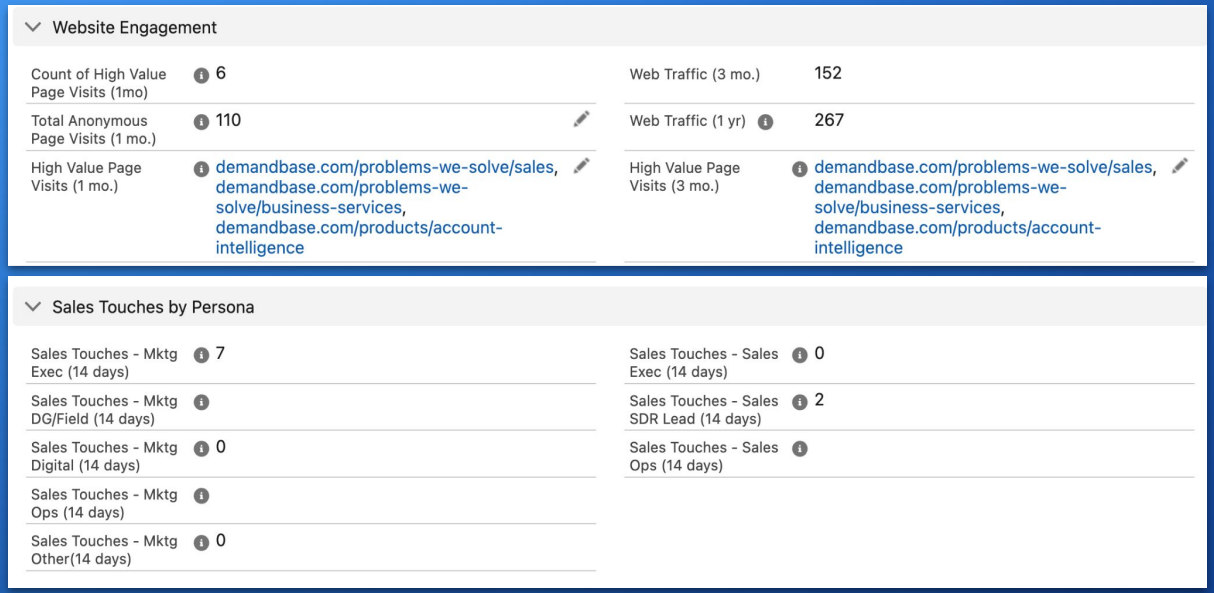
Account Name	First Name	Last Name	Title	Engagement Minutes (1 mo.) ↓	Sales Touches - Mktg Ops (14 days)	Sales Touches - Sales Ops (14 days)	High Value Page Visits (3 mo.)
Ingram Micro	[redacted]		Associate Marketing Automation	264	-	0	demandbase.com/products/advertising, demandbase.com/on-demand-demo/demandbaseone, demandbase.com/book-meeting/thank-you
EcoVadis	[redacted]		Digital Marketing and Operations Manager	245	0	0	demandbase.com/resources/ebook/2021-gartner-abm-critical-capabilities-thank-you, demandbase.com/why-demandbase/6sense, demandbase.com/calculators/gtm-assessment
Nintex	[redacted]		Sr Marketing Operations Manager	189	9	4	demandbase.com/problems-we-solve/build, demandbase.com/problems-we-solve/find, demandbase.com/on-demand-demo/demandbaseone

Engaged Demand Generation

Account Name	First Name	Last Name	Title	Engagement Minutes (3 mo.) ↓	Sales Touches - Mktg DG/Field (14 days)	High Value Page Visits (3 mo.)
Environmental Systems Research Institute, Inc.	[redacted]		Senior Campaign Manager	314	-	demandbase.com/on-demand-demo/demandbaseone, demandbase.com/product-tour/abx, demandbase.com/products/evaluate-db
Cloudflare	[redacted]		ABM	240	0	demandbase.com/product-tour/abx, demandbase.com/products/personalization, demandbase.com/products/account-based-experience
Cloudflare	[redacted]		marketing	227	0	demandbase.com/product-tour/abx, demandbase.com/products/personalization, demandbase.com/products/account-based-experience

- MQLs + cookied contacts who are engaging with your company: via website, marketing campaigns and sales outreach
- View overall engagement and cross-reference sales activity via sales touches
- Do high-value page views and campaign engagement match what this persona would be interested in?
    - If so, you know you have a strong buying signal, especially if you have multiple people from the same persona researching the same or similar topics

Sales Touches by Persona Multi-threading Example



Website Engagement

Count of High Value Page Visits (1mo)	6	Web Traffic (3 mo.)	152
Total Anonymous Page Visits (1 mo.)	110	Web Traffic (1 yr)	267
High Value Page Visits (1 mo.)	demandbase.com/problems-we-solve/sales, demandbase.com/problems-we-solve/business-services, demandbase.com/products/account-intelligence	High Value Page Visits (3 mo.)	demandbase.com/problems-we-solve/sales, demandbase.com/problems-we-solve/business-services, demandbase.com/products/account-intelligence

Sales Touches by Persona

Sales Touches - Mktg Exec (14 days)	7	Sales Touches - Sales Exec (14 days)	0
Sales Touches - Mktg DG/Field (14 days)		Sales Touches - Sales SDR Lead (14 days)	2
Sales Touches - Mktg Digital (14 days)	0	Sales Touches - Sales Ops (14 days)	
Sales Touches - Mktg Ops (14 days)			
Sales Touches - Mktg Other(14 days)	0		

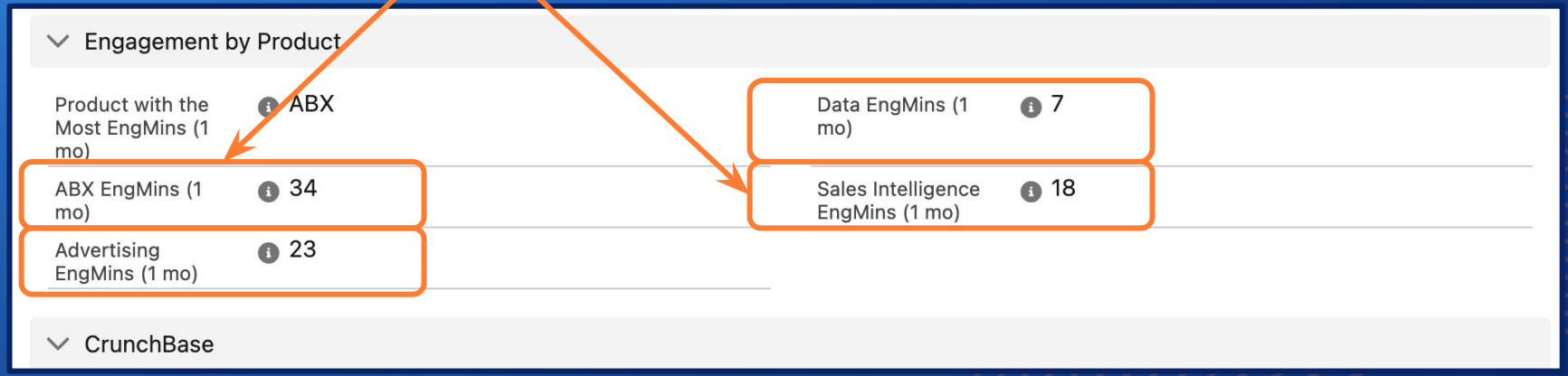
**Requirements: Sales Touches by Persona + High-Value Page Visits set-up*

- High-value page visits in last month are around what we do for sales persona and account intelligence (a product for sellers)
- As a Sales Leader, I would want to see recent touches on sales buying group members
  - In this example, we have reached out to SDR Leader but no recent touches on Sales Execs or Sales Ops
  - Latter two are typically people with buying power, need activity there

Example 1 - Using Engagement by Product for Multi-threading

Company XYZ in this case, is showing the most engagement for Product 1 “ABX”. This means that the pages they are visiting are tied to Product 1”ABX” (our core marketing platform). Because of this we would start outreach to this account leading with Product 1 “ABX” messaging.

Map products to typical buying groups for those products



*Engagement minutes by product are calculated fields pushed to SFDC

Example 1 - Tie High-Value Page Visits to Product/Persona

- demandbase.com/30mpc
- demandbase.com/problems-we-solve/sales
- demandbase.com/resources/event/sales-happy-hour-nyc-2024
- demandbase.com/blog/100-powerful-women-in-sales-2023

These UTMs are associated to our **Sales Product and Persona**

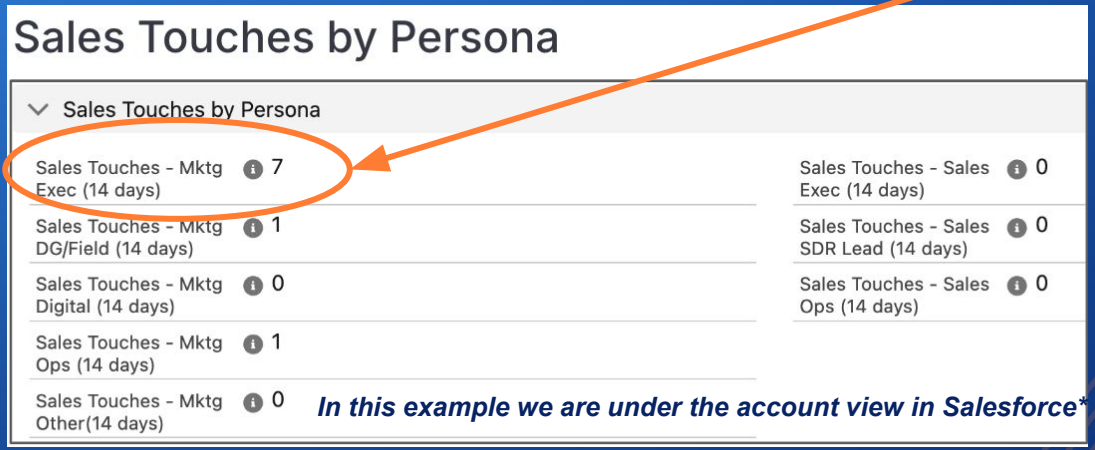
- demandbase.com/no-wasted-budget
- demandbase.com/products/advertising
- demandbase.com/why-demandbase/only-b2b-dsp

These UTMs are associated to our Marketing**, more specifically Digital Mktg. Persona**

Example 1 - Rep accountability to multi-threading

Company XYZ, is showing the strongest engagement with Product 1 “ABX” under their Salesforce account view. Sales Managers usually want to know if their reps reaching out to the personas relevant to that solution?

In this example we can see the Marketing Exec Persona has several touches in the past 14 days (associated to Product 1 “ABX”,) but little outreach with the personas who are likely interested in that product (Demand Gen, MOPs, SOPs and Sales Exec

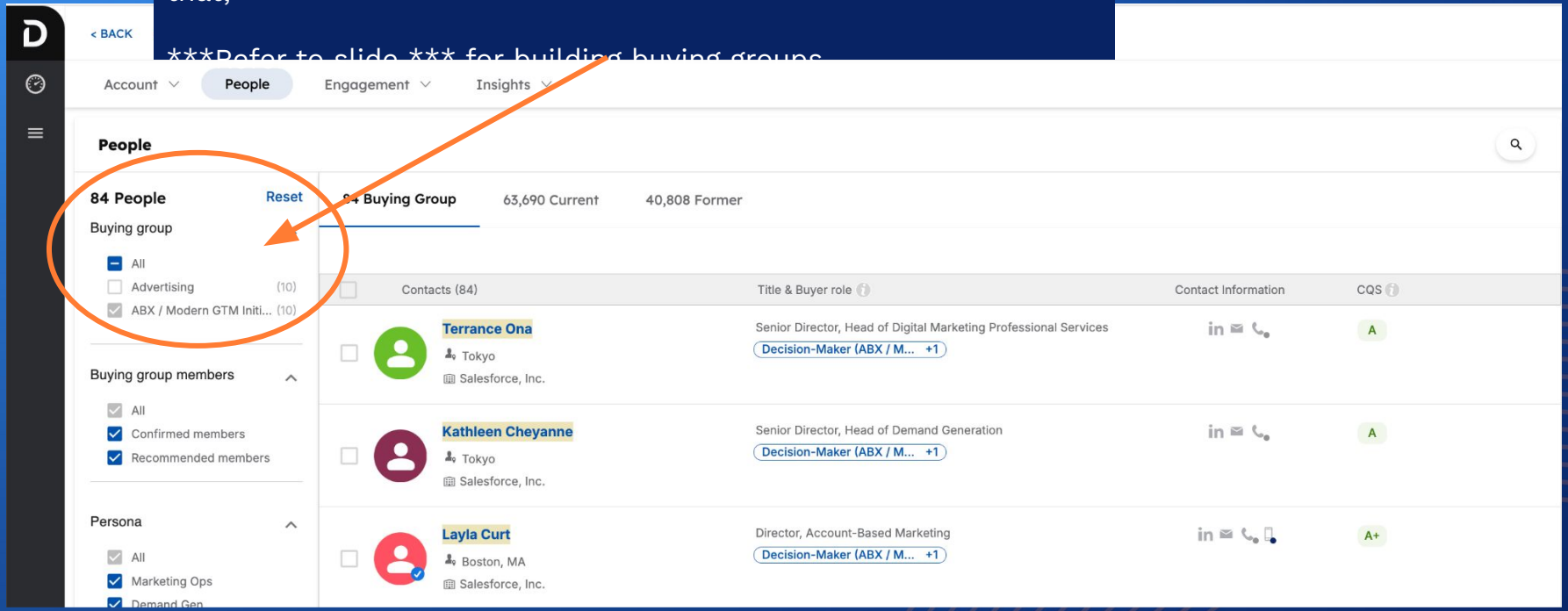


Pro Tip*; To build productive SDR - AE relationships/weekly stand ups. Advise each to come up with the top 15 accounts they want to target for week. Jump into account list together - Understand where progress is being made or personas that may need to be worked more.

Example 1 - Map out Buying team Pertaining to Product Interest

*Knowing it's product 1 "ABX" they are showing the strongest engagement with, let's start with the personas relevant to just that;

***Refer to slide *** for building buying groups

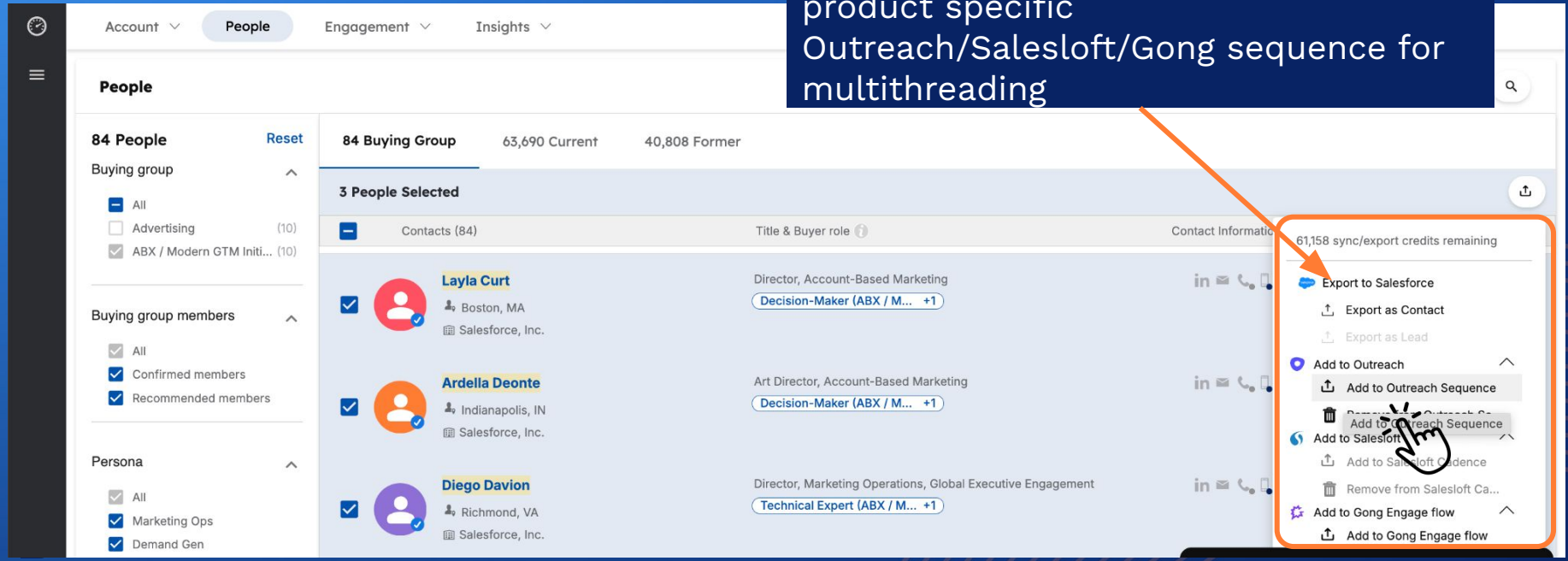


Example 1 - Take action in sales engagement

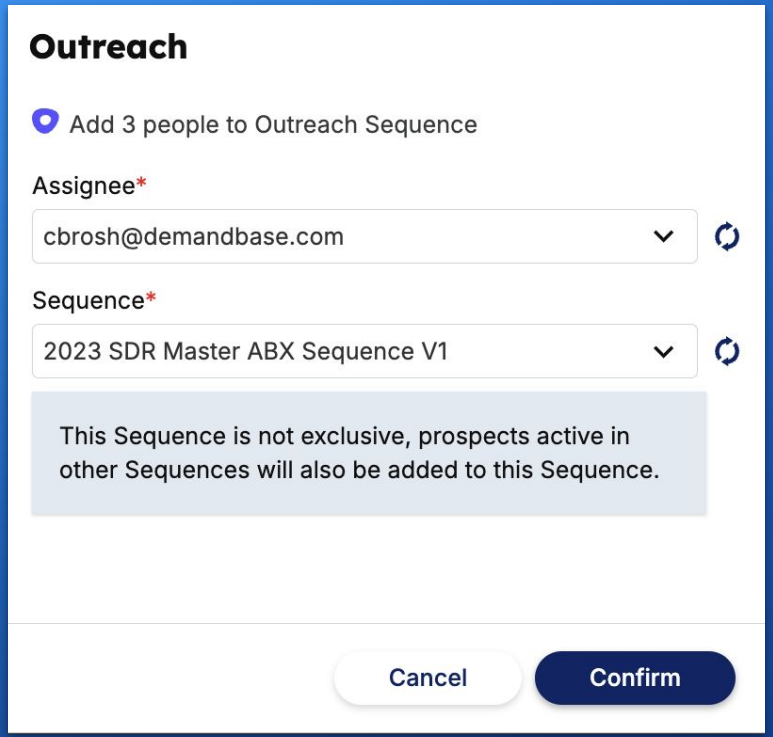
Now that we have identified;

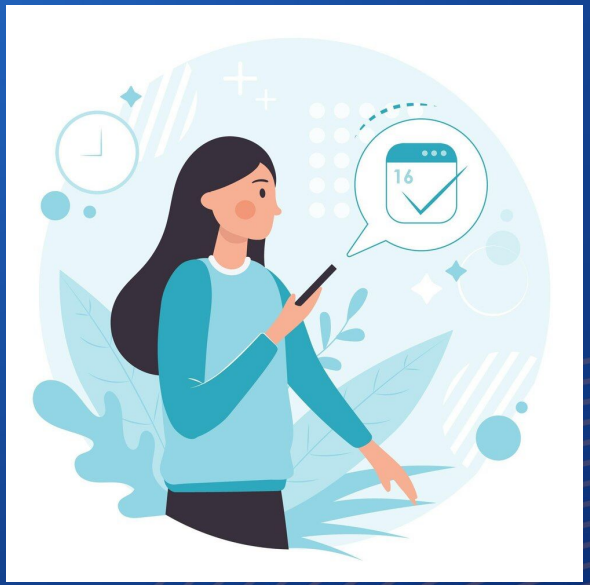
1. Company XYZ is showing the strongest engagement with our Product 1 “ABX” content
2. The Product 1/ABX - buying group members

Add entire buying committee into product specific Outreach/Salesloft/Gong sequence for multithreading

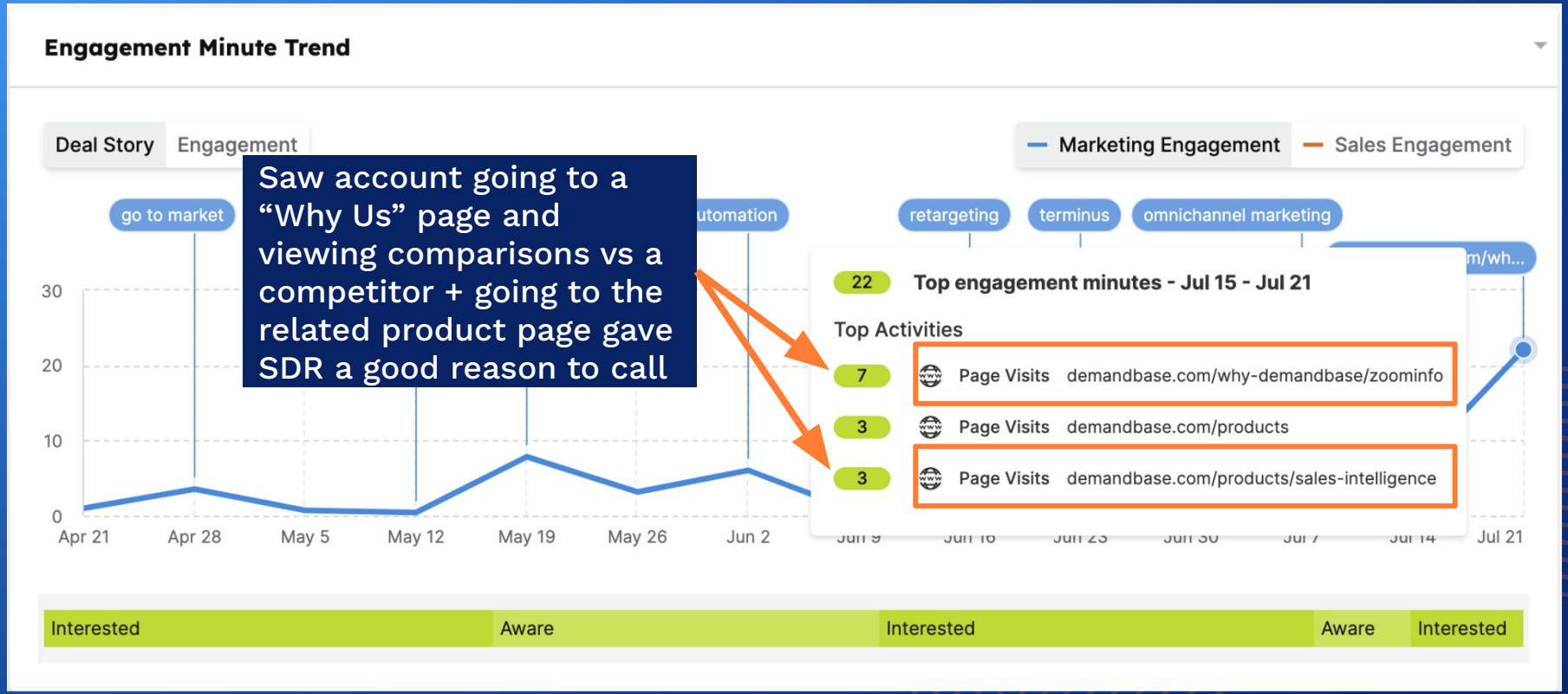


Example 1 - Push to sequence for that product + persona





Example 2 -> Multi-threading above the line + below the line

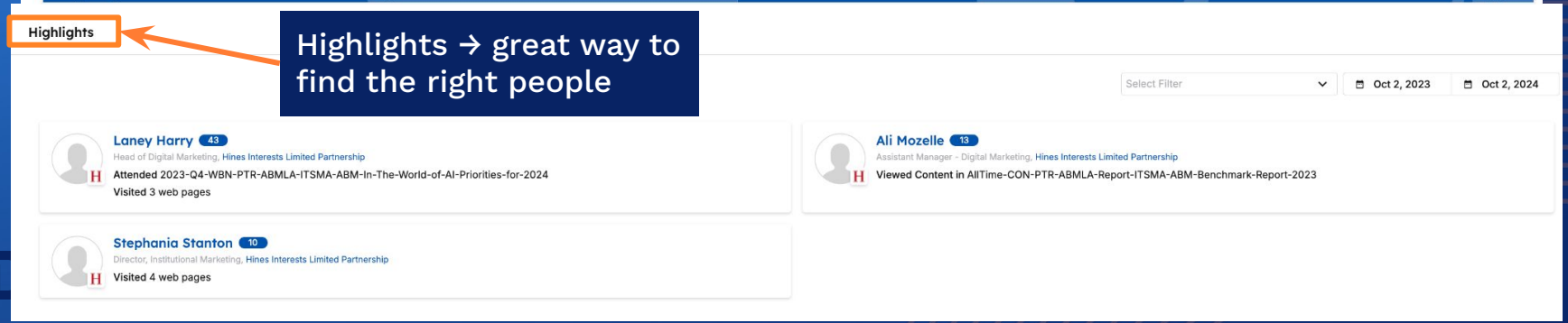


Example 2 -> Multi-threading above the line + below the line

Timeline → great way to see summation of interest from both known and unknown contacts

Extend engagement period out further to see who has been engaged in the past year and use them as your starting point

Highlights → great way to find the right people



Example 2 -> Multi-threading above the line + below the line

1. Called SVP of Marketing after a conversation with Head of Digital Marketing and Strategy
    - DB SDR: “...help in identifying the top accounts that are in market for your solution or your competitors.”
    - SVP Mktg: **Directed me to another contact that I had already spoken with**
    - DB SDR: “...you're still putting an {product} strategy in place? Is that right?”
    - SVP Mktg: **Provided additional contacts focused on ABM and Campaigns**
    - DB SDR: “ I'll have that report put together for you...”
    - SVP of Marketing : **Suggested I work with Director of Marketing to build the report to make it the most valuable**
2. Follow-up conversations w/ Director of Marketing learned keywords of interest and eval with 2 ABM competitive technologies
3. More follow-up with Head of Digital revealed interest in meeting with multiple members of team to see results of PAR

What we learned

- Multi-threading
- Take information gathered up the chain
- Higher ups refer back down and make priority
- Don’t be afraid to push back
- Embrace the slow play and enjoy the win

Thank You!