

ABM Technology

A Guide To Choosing The Right Vendor

Today's B2B buying journey has become almost entirely digital. So no surprise that many companies are turning to an account-based approach to the customer experience

to meet buyers where they are. But given the ever-growing list of technology vendors, it's become more difficult than ever to pinpoint and invest in the right account-based solution. If you're shopping around for account-based marketing (ABM) technology, the questions and criteria below can help guide your thinking.



Build an account-based foundation

The first step in creating your account-based experience is building an account-based foundation. A fragmented view of accounts tells you nothing. Create a single view of all your account data so Marketing and Sales can act as one team. Find a vendor that can connect your different sources of 1st party data and 3rd party data in one platform so you can create account and people lists and segment your market.

Segment Management

Connect Disparate Data Sources and Manage Audiences

DOES THE VENDOR:

- Connect with CRM?
- Connect with your MAP?
- Let you upload any list?
- Create a single view of target accounts, people, and activity data?
- Expose additional data related to the accounts in your audience, including firmographic, technographic, intent, and engagement activity?
- Enable you to easily use your audiences to execute via other channels like email campaigns, direct mail, advertising or website personalization?
- Allow for segmentation across different object types like Accounts, People, Opportunities and Activities in one list?
- Allow you to easily filter your audience by first and 3rd party attributes like firmographics, technographic, intent and site activity? If so, can those filtered audiences be saved?
- Enable advanced list segmentation logic (and/or/parenthetical groupings)?
- Further refine and segment existing campaign, audience or automation lists?
- Allow you to create dynamic audiences for use in advertising or other engagement channels?

Data Insights And Management

Get Trusted Data and Intelligence about Accounts and Contacts

DOES THE VENDOR:

- Get accurate company information including financials, employee counts, industries, and locations?
- Identify and deanonymize the account of any visitor on any webpage?
- See into a company's current tech stack and future technology needs?
- Predict what technologies a company will purchase next?
- Provide proprietary intent data sourced using AI and Natural Language Processing?
- Identify decision-makers at target accounts?
- Power your applications with API access to their data?
- Clean, unify, and visualize your CRM data with reliable, up-to-date data management?



Find In-Market Accounts

Having a Sales and Marketing agreed upon target account list is a good first step in ABX but does not account for the hidden gems that may be in-market for your product or service. Using AI, Machine Learning and Intent helps you discover both known and unknown accounts that may be ready to buy.

Predictive Analytics

A Combo of Intent, AI and Machine Learning to Power Your ABM

DOES THE VENDOR:

- Allow you to customize and build models and scores that predict the likelihood of a sales opportunity?
- Have multiple models to predict opportunities for multiple product lines or business units?
- Allow you to customize and build models and scores to identify your target customer profile?
- Quickly build and train its predictive models to get you up and running in 24 hours?

Account Selection

Build Dynamic Target Account Lists that Include the Right Accounts

DOES THE VENDOR:

- Identify accounts based on a variety of data, including firmographic, technographic, behavioral and intent signals?
- Go beyond company-level firmographics to understand individual buyers at key accounts?
- Score, rank and provide insights into existing, known accounts?
- Help identify accounts outside of your existing CRM data?
- Leverage Artificial Intelligence (AI) technologies to identify buying signals in real-time?
- Provide direct activation into marketing channels from the target account list?
- Use segmentation defined in the account selection environment to drive site customization?
- Enable sales intelligence alerts based on audiences created in the account selection environment?
- Enable an engagement model for individuals that measures known activity?
- Customize account stages to your specific business needs?
- Enable cross-sell and upsell through post-sales account stages?
- Match leads to accounts automatically and provide tie-breakers for multiple matched accounts?
- Automatically log email and calendar activities to Salesforce leads and contacts?

Engage Accounts

Buyers hate generic messages and tune out omni-spam. Look for a vendor who can help you target accounts with relevant interactions along the buying journey. Whether it's advertising to your target accounts or orchestrating cross-channel plays, having an account-based lens throughout this experience ensures you are targeting the right accounts with the right message.

Advertising

Run Targeted Advertising Campaigns that Reach the Right Individuals and Accounts

DOES THE VENDOR:

- Use a purpose-built B2B DSP to target B2B accounts?
- Run campaigns that target key accounts, and buying committees within those accounts, and optimize bids based on their intent?
- Protect brand safety through mechanisms such as whitelists?
- Offer transparency with its whitelist?
- Provide campaign delivery reporting at the domain level?
- Provide transparency into its targeting data, its sources and how it is derived?
- Allow you to serve personalized ads on an anonymous basis?
- Support the creation of advertising campaigns directly from account lists and filtered account list audiences?
- Offer dynamic ad creative that is responsive to company, industry and other attributes at the impression level?
- Allow you to target and personalize advertising using a combination of IP, cookie and first party data?
- Provide campaign reporting using B2B metrics?
- Leverage AI to manage frequency caps and budgets appropriately and optimize bids for the right users at the right accounts more evenly?
- Offer named account service personnel to partner with you from strategy through execution?

Website Personalization

Deliver Personalized Website Experiences Based on Individual Visitors

DOES THE VENDOR:

- Identify known and anonymous visitors?
- Let you build customizable, personalized experiences for known and unknown visitors?
- Support integrations with related platforms like CMS and A/B testing platforms?
- Personalize headlines, website heros, CTAs, promos all on a single webpage?
- Allow you to create multiple web page experiences for different stages of the customer journey?
- Have a web form integration for lead enrichment?
- Use dynamic lists and segmentation to ensure your accounts are always getting the right experience at the right time?

Orchestration

Orchestrate Account Engagement Across Channels

DOES THE VENDOR:

- Dynamically move accounts/people into specific email campaigns based on trigger points?
- Dynamically move accounts into specific advertising campaigns based on trigger points?
- Automatically change lead/contact status within CRM campaigns?
- Automate the creation of CRM tasks?
- Define the segment based on all available data from across CRM/MAS/Inbox activities?
- Automatically change/update people/account/opportunity data within SFDC based on rules?
- Automatically add/remove people from Salesloft/Outreach/CRM Campaigns?
- Offer advanced/recurring scheduling options?

Close Accounts

After guiding prospects through the B2B buying journey, it's not uncommon to encounter friction that delays the close. That's where reliable sales insights come in handy. Understand what accounts are researching and who has engaged with your content so you can craft the right message to the right person at the right time. Now that's a recipe for success!

Sales Intelligence

Inform Sales Strategy with Meaningful Insights

DOES THE VENDOR:

- Deliver sales insights in real-time or close to real-time?
- Deliver sales insights in CRM, on a browser extension, email and other chat tools like Slack?
- Provide insights that go beyond the basic enrichment of firmographic data?
- Provide actionable sales insights that are customizable by sales rep?

Measure Performance

Getting insights on accounts and campaigns along the buyer journey is paramount to a successful ABX strategy. If you can't connect the dots to the accounts, they'll stay dots. So find a vendor that helps you measure ABM performance in one place.

Reporting & Analytics

Measure the Performance of Your ABM Strategy

DOES THE VENDOR:

- Centralize your existing data sources in one location?
- Track B2B metrics by account?
- Offer a dashboard to measure ABM impact from across the funnel?
- Enable you to create new audiences based off of firmographic, technographic, behavioral and intent data, in order to execute across the funnel?
- Track volume, velocity and conversion metrics for each journey stage?
- Offer customizable subscriptions for all custom reports?
- Provide people and account based heatmaps?
- Track and report on anonymous first-touch visitors by account?
- Allow you to combine first party, 3rd party, firmographic and technographic data for segmentation and reporting?
- Have strategic services in place to help you set up ROI reporting based on your strategies?
- Allow you to compare the performance of different audiences or account lists and evaluate the impact of specific programs?
- Allow you to compare different timeframes for account stages?
- Enable you to see the engagement and activities that influenced the different stages of a deal cycle?
- Provide advanced BI capabilities for ABM?

- Deliver insights based on website engagement? If so, do they differentiate the type of visit?
- Automatically log emails and calendar activities into the ABM Platform?
- Make it easy for sales to take action on accounts and people in sales engagement platforms from the ABM Platform?
- Provide intent, deal story, communication history and people highlights all within CRM?
- Help you find and connect with the right prospects?
- Get the latest and most actionable news about prospects with curated news and social insights?
- Build highly targeted lists of qualified prospects and customize your lists using dozens of filters, including news and keywords?
- Optimize account-based efforts by understanding how accounts relate to each other through corporate hierarchies?
- Enable sales intelligence alerts based on audiences created in the account selection environment?

Vendor Onboarding & Support

Get Up and Running and Start Delivering Value Quickly

DOES THE VENDOR:

- Deliver quick time to value?
- Provide on-demand and custom training sessions?
- Provide ABM strategic workshops, best practices and thought-leadership materials?
- Offer strategic ABM support from seasoned marketers?
- Offer managed services for program optimization, reporting & insights and operational enablement?
- Conduct performance reviews on a quarterly basis?
- Offer ABM Certification courses?
- Offer full day strategic workshops?
- Provide relevant ongoing topical office hours?
- Offer technical consulting?
- Offer strategic support for custom reporting and analysis?

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