# Developing an Account-Based Marketing Program

*A Workbook for Success*

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# INTRODUCTION

## *What is account-based marketing (ABM)?*

A strategic approach marketers use to find, engage and nurture decision-makers at pre-defined accounts, account-based marketing (ABM) is making its way into B2B marketing plans everywhere. In many cases, it's becoming a "must have" line item for 2016. More than just an initial engagement tactic, a full-fledged ABM program also supports the post-sale customer lifecycle, using marketing's toolkit to contribute to the overall customer experience at targeted accounts.

The promise of ABM is efficiency and effectiveness. It decreases the amount of time and resources marketers spend engaging with less-valuable audiences, enabling them to target specific, proven audiences, generate higher-value leads and close a greater number of profitable deals.

ABM is only a smart strategy when done right – with the correct targeting, data and tools in place to manage and scale results. To execute an ABM program, marketers shouldn't typically abandon broader lead gen initiatives, at least not until they can deliver a full lead-to-pipeline-to-revenue model that's predictable with only named accounts. Otherwise, they risk depleting their pipeline while precluding the chance of identifying new target audiences (persona and account types).

Further, once marketers make the ABM commitment, they must remember "companies don't buy anything, people do." Therefore, a comprehensive ABM program requires the use of:

- Clearly defined goals
- A structured communication strategy between sales and marketing
- A fully developed content marketing plan
- A fairly sophisticated marketing technology stack
- Multiple, centralized lead sources that can distribute content to specific personas within named accounts
- Easy access to ABM prospect and program data to select and continuously adjust (in flight) the right mix of media and engagement tactics

 

## *Why we created this workbook, and how to use it*

So, you're bought in. Ready to go. You understand how important account-based marketing is to your organization's marketing success, as well as your alignment with the sales organization. You're ready to start executing. But how do you turn a great idea and a good strategy into action? How do you translate good intentions into results?

This workbook was developed to be your guide. It's full of templates, instructions, meeting agendas, technology recommendations and more to convert potential into real achievements. We expect these tools will give you a significant head-start, but that you'll still need to customize and personalize the worksheets and suggested tactics within to your specific industry, company and target accounts. If we can be of any help as you do that, please don't hesitate to reach out and ask.

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## *Get the complete file of all eight ABM worksheets here.*

- **Worksheet A:** Lead-Opportunity-Close Goal Model
- **Worksheet B:** Monthly & Weekly Progress Model
- **Worksheet C:** Role Assignment Table
- **Worksheet D:** Account & Persona Development Table
- **Worksheet E:** Content Map by Buyer's Journey Stage
- **Worksheet F:** Content Map by Lead-Opportunity Stage
- **Worksheet G:** ABM Technology Table
- **Worksheet H:** ABM Tech Vendor Checklist/Scorecard

*Step 1*

# Developing Objectives & Success Metrics

All good marketing programs, including account-based marketing efforts, start with a plan that outlines and breaks down what pipeline volume is required to hit the sales goal.

This can be done on a monthly or quarterly basis or even pivot based on the number of sales required or the number of targets you have – the customization of the model is up to you. The key, however, is developing your ABM program strategy with a clear sense for what's required of both sales and marketing to hit your organization's customer, revenue and profit goals at the end of the year.

# WORKSHEET A: LEAD-OPPORTUNITY-CLOSE GOAL MODEL

## *How to Use Worksheet A*

This template assumes different sized markets, but you can just as easily break it down by product type, how your sales team is organized, go-to-market channels (i.e. inside/direct vs. partners), etc. The value is in outlining the lead objectives required to achieve pipeline and sales goals.

*Note: The sample table below is very simplified rendition of Worksheet A, shown for the sake of visualization. The actual excel spreadsheet is much more substantial and it too is prefilled with example figures to help guide customization for your organization's needs.*

| ASSUMPTIONS | |
|---|---|
| Mid-Market Average Selling Price (ASP) | $65,000 |
| Small Enterprise ASP | $120,000 |
| Large Enterprise ASP | $240,000 |
| Opportunity/Close % | 25.0% |
| Lead/Opportunity % | 5.0% |
| | |
| Mid-Market Sales # | 4 |
| Small Enterprise Sales # | 2 |
| Large Enterprise Sales # | 1 |
| Total Sales $ | 6 |
| | |
| Mid-Market Sales $ | $260,000 |
| Small Enterprise Sales $ | $240,000 |
| Large Enterprise Sales $ | $120,000 |
| Total Sales $ | $620,000 |

# WORKSHEET B: MONTHLY & WEEKLY PROGRESS MODEL

## *How to Use Worksheet B*

A continuation of Worksheet A, this simple model breaks down the required monthly lead and opportunity goals into expected weekly progress metrics. We recommend high-level sales progress metrics be tracked monthly or quarterly, but that you also measure weekly momentum towards those goals. This includes how many new opportunities are created, how many dispositions (i.e. live qualifying conversations with prospects) are happening, and how many new leads are being generated for the sales team to qualify/disposition.

| MONTHLY NEW OPPORTUNITIES | JAN 16 |
|---|---|
| Mid-Market Pipeline # | 16 |
| Small Enterprise Pipeline # | 8 |
| Large Enterprise Pipeline # | 4 |
| Total Pipeline # | 28 |
| **APPROXIMATE NEW OPPORTUNITIES - WEEKLY** | **JAN 16** |
| Mid-Market | 4 |
| Small Enterprise | 2 |
| Large Enterprise | 1 |
| **APPROXIMATE NEW DISPOSITIONS - WEEKLY** | **JAN 16** |
| Mid-Market | 12 |
| Small Enterprise | 6 |
| Large Enterprise | 3 |

*Note: The table shown here is again a simplified rendition of Worksheet B.*

# SALES & MARKETING KICK-OFF AGENDA

With initial drafts of worksheets A and B completed (or at least with early ideas and figures sketched out), your next step is to communicate preliminary goals with your sales counterparts. Hosting a meeting between key sales and marketing managers to introduce and launch your account-based marketing program is pivotal. (*Note – depending on your organization's processes and roles, it may be difficult to fill out Worksheets A and B without substantial sales feedback; if this is the case, plan to complete these worksheets during and after the kick-off meeting*).

Remember that many sales organizations have been executing "Named Account" programs for years, but may not be used to their marketing counterparts following suit. Much useful information will come from sales' experiences; for example, sales' idea of what types of accounts should be targeted may vary substantially from what your marketing data suggests.

This meeting is your opportunity to get all parties on the same page with regard to objectives, definitions, who's doing what, and how you will both execute, measure and adjust tactics moving forward.

It's essential to absorb sales' input and communicate your own intentions to come to a consensus – ABM isn't effective if sales and marketing don't lock arms and work together. Consequently, you should expect to make adjustments to worksheets A and B during or after these meetings.

### Meeting Objectives

- Discuss organization-wide goals (e.g., customer acquisition and retention, revenue, profit, etc.)
- Discuss specific sales goals
- Discuss specific leading indicator goals (e.g., opportunities, regular account engagement/penetration momentum metrics, etc.)

### ABM Strategy Roles

- Discuss who owns what:
    - Executive sponsors
    - Sales and marketing program managers
    - Front-line staff (e.g., content creation, engagement tactics and measurement, lead scoring, etc.)

### ABM Program Definitions

- Agree on definition of "Named/Targeted Account" (e.g., which type of firmographics are included? How specific should targeting parameters be?)
- Agree on specific set(s) of named accounts to pursue

- Agree on decision-makers, titles and/or roles to pursue (e.g., which personas within named accounts will you be targeting? Do these targeted personas differ between account types?)
- Agree on buying-stage definitions (e.g., marketing-qualified lead, sales-accepted lead, opportunity, etc.)
- Agree on when and how leads should be handed off from marketing to sales (e.g., lead scoring processes)

**ABM Program Processes**

- Discuss rhythm of working together
  - Quarterly business reviews
  - Monthly progress reviews
  - Weekly tactical reports/improvements
- Discuss specific roles for each group
  - Marketing
    - List development
    - Content creation
    - Engagement tactics
    - Nurturing tactics
    - Social- and trigger-event signals
    - Technology solution and integration needs
    - Program reporting and analysis
  - Sales
    - Lead follow-up
    - CRM-driven reporting
    - Qualitative feedback from the field

**Reporting**

- Develop specific reporting formats, cadences, and communication with stakeholders
- Define meeting rhythm for review, optimization

# WORKSHEET C: ROLE ASSIGNMENT TABLE

## *How to Use Worksheet C*

Use this spreadsheet as a starting point for very clearly assigning which departments (and ideally which specific individuals) will own various components of the program. Much of this can be completed during your initial sales-marketing kick-off meeting, but you'll likely need to continually update and adjust according to changing needs, new technology adoptions, new vertical opportunities, etc.

| | SALES | MARKETING | SUPPORT | OPERATIONS | IT |
|---|---|---|---|---|---|
| Strategy & Objectives | | | | | |
| Target Audience Definition | | | | | |
| Content & Engagement Strategy | | | | | |
| Execution Detail | | | | | |

*Step 2*

# Determine Target Audience

Before you can develop content and begin engaging individuals with your target accounts, you'll need to answer several specific questions:

- Who specifically are you selling to? (Remember: you may be targeting a number of named companies, but it's specific individuals within these organizations that buy your products, and you need to understand their motivations and purchasing triggers)
- What are their objectives, and obstacles to success?
- How specifically do they navigate stages of a typical buyer's journey?

The better you can answer these and related questions, the more precisely and successfully your sales and marketing teams will be able to resonate with and mobilize your target accounts.

Answers to these questions should come from both your sales team and marketing data acquired from your marketing automation systems, predictive analytics tools and website tracking tools (See "Chapter 4: Account-Based Marketing Software & Tools").

The following templates were created to help you crystallize and formalize both decision-maker descriptions and specific buying stages for your target accounts. We recommend that marketing teams own creation and completion of these documents, but that they be agreed upon and shared/leveraged jointly between sales and marketing. This will ensure that the content, stories and messaging in front of target accounts are consistent, crisp and accurate.

# TARGET ACCOUNT & PERSONA CHARACTERISTICS

The following account-persona template is an example meant to guide you through your own target-account and persona creation efforts. It includes both firmographic and individual, role-based parameters to ensure your ABM content creation and engagement tactics won't be wasted on the wrong individuals within your targeted accounts.

Of course, your own account-persona template should be customized to your organizational needs and may not include each of the following elements.

## *Account-Persona Template Example:*

**Tier One Supplier**

**Profile Overview:**
Tier one companies are direct suppliers to OEMs. Similar to the OEM structure, Tier one roles are organized into program teams around a particular part that goes into a particular make and model of a vehicle. These program teams are made up of a program manager (who oversees the entire manufacturing and assembly process), quality and mechanical engineers, and buyers.

Engineers are technical specialists who focus on the fit and functionality of the parts and ensure that quality certifications are in order. They work in the plant where the part is being manufactured.

Buyers are responsible for having the right parts in sufficient quantity to ensure the manufacturing process runs smoothly and is not delayed. Buyers work at the plant and can support many program teams. They report to Commodity Managers who award the business. They buy for an entire category and are responsible for budget, negotiating price on each part.

## *Profile Attributes*

**Firmographics:**

**Titles:**

- Program Manager: Oversees assembly of parts
    - Commodity Manager: Buys for category, negotiation and awards business, works out of corporate office
    - Buyers: Buy for a specific program, do the legwork for commodity manager, typically works out of the plant
    - Program Engineers: Fit and functionality of the parts to OEM's specifications
    - Supply Quality Engineer: Ensures certifications are in order
- Company size: 200+ employees
- Functional areas: purchasing, engineering

**Geography:**

- Typically close to OEM manufacturing facilities

**Other Considerations:**

- Work is awarded by program (particular make/model of vehicle)
- Long sales cycles; typically 12-18 months to qualify the particular part and process

**Responsibilities:**

- Assemble and deliver parts in a timely manner; per fit and functional specifications as outlined by OEM
- Ensure quality certifications are in order
- Manage inventory of incoming parts from Tier 2 suppliers
- Negotiate pricing with Tier 2 suppliers to ensure part is delivered at agreed upon cost to OEM

**Key Drivers:**

- Cost and delivery
- Dependability and scalability
- Reputation for quality
- Service and engineering support

**Pain Points:**

- OEMs are always trying to reduce costs of materials and parts which squeezes suppliers' margins
- Meeting strict quality requirements of the OEM and government regulations
- Consistent quality and delivery of Tier 2 parts

**Value Propositions:**

- Reduce material costs
- Improve quality to meet OEM standards and government regulations
- Increase delivery consistency for improved predictability

# WORKSHEET D: ACCOUNT & PERSONA DEVELOPMENT TABLE

## *How to Use Worksheet D*

Worksheet D helps you complete the individual elements that will come together to form your completed account-persona template. Again, data required to complete this worksheet should come from a number of sources: sales reps, marketing automation system reports, predictive analytics tools and ABM website tracking software (See "Chapter 4: Account-Based Marketing Software & Tools").

Start by defining your verticals (e.g., enterprise technology companies) and even naming specific accounts, then proceed to explain the drivers, pain points and your organization's unique value propositions by each role within those account types. Messaging by each role should be completed last.

Once this template is completed and agreed upon with sales, pull together the included information to create your own account-persona template such as the example above.

| VERTICAL #1 | AUDIENCE | DRIVERS | PAIN POINTS | VALUE PROPOSITION | KEY MESSAGES |
|---|---|---|---|---|---|
| | CMO | | | | |
| | IT/CIO | | | | |
| | CFO | | | | |
| | CMO | | | | |

*Step 3*

# Complete Content & Engagement Strategy

Once you've fleshed out the details of your target accounts and relevant personas, it's time to translate that into actionable content. This includes mapping the prospect's objective and needs to stages of the buyer's journey, outlining offers and accelerators to move prospects more quickly from one stage to another, as well as a crisp understanding how your content and offers map to the lead and opportunity stages you use in your CRM and within your marketing automation platform.

These worksheets, once completed, will serve as the foundation for the content, copy, editorial calendars, sales enablement tools and more that both sales and marketing will use to communicate with target accounts.

# WORKSHEET E: CONTENT MAP BY BUYER'S JOURNEY STAGE

## *How to Use Worksheet E*

This worksheet is used to develop and attach specific pieces of content to each stage of the buying cycle by each individual persona in identified account verticals. You'll find that many pieces of content work across several personas and account types. Having this spreadsheet created well in advance of scheduled distribution will ensure efficient use of resources. Further, keep in mind that repurposing material with slight adjustments (tailored to persona needs) is a key content marketing tactic and will save a great deal of time and effort.

Note the distribution tactics that will be used at each stage when deciding content asset type. For example, white papers and eBooks may be used for initial account-based lead gen efforts via third-party content syndication partners. While repurposed content from such white papers can be formed into nurture email templates or even IP-targeted banner ads.

| CATEGORY | PERSONA | STAGE 0 ATTENTION | STAGE 0-1 ACCELERATION OFFERS | STAGE 1 LOOSEN THE STATUS QUO |
|---|---|---|---|---|
| Vertical 1 | | | | |
| Vertical 2 | | | | |
| Vertical 3 | | | | |

*Note: The table shown here is a simplified rendition of Worksheet E.*

# WORKSHEET F: CONTENT MAP BY LEAD-OPPORTUNITY STAGE

## *How to Use Worksheet F*

Similar to Worksheet E, this table provides another method of assigning specific assets to various buying stages, based on interest level. In most cases, it's best to customize your own worksheet to your organization's specific buyer stages and prospect-phase definitions. Use both Worksheets E and F to provide ideas and guide you through your own tailored content-assignment process.

| | STAGE | DEFINITION | CONTENT/TOPICS | TOOLS/FORMATS |
|---|---|---|---|---|
| **LEADS** | Open/Not Attempted | | | |
| | Attempting to Contact | | | |
| | Interested | | | |
| | Nurture | | | |
| | Unresponsive | | | |
| | No Further Action | | | |

*Note: The table shown here is a simplified rendition of Worksheet F.*

# MARKETING ENGAGEMENT TACTICS

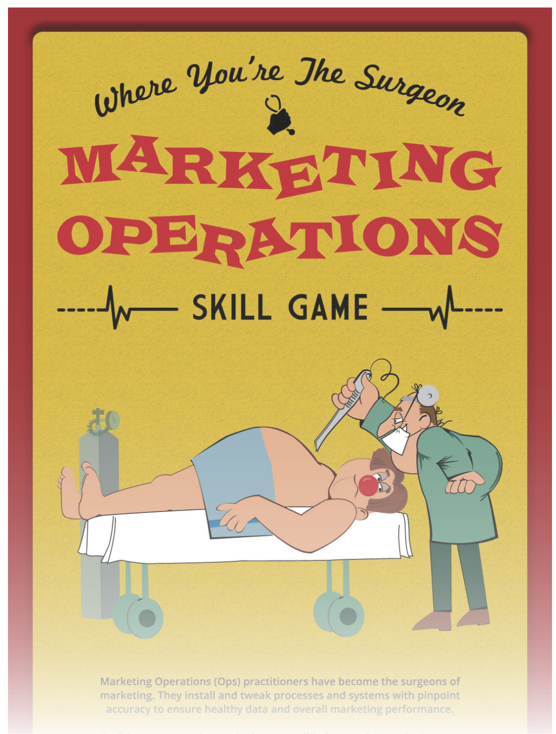
## Introduction

Specifically *which* tactics make sense for your target accounts depends entirely on how well you understand the prospect's ecosystem, content consumption habits and preferences, as well as their internal and external influences.

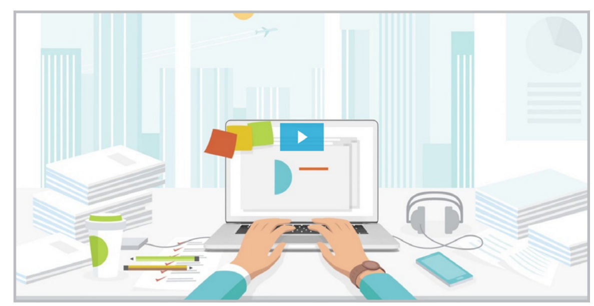
The outline below is meant to serve as a representative inventory of content types and tactics to both spark inspiration as well as pull from and prioritize as you begin execution in the field. Most of these engagement tactics distribute content through the use of various ABM technologies, such as marketing automation systems, automated outbound demand gen software, website personalization and IP-based ad-targeting tools (Discussed further in Chapter 4). Automating content distribution via technology has several key benefits: greater efficiency, transparency, insights, control, scalability and predictability.

**Content Types**

- Blog posts
- White papers
- eBooks
- Infographics
- How-to guides
- Checklists
- Email templates
- Podcasts
- Videos
- Slideshare presentations
- Customer Q&As
- Display banners (for IP-targeting)







*Sample content types.*

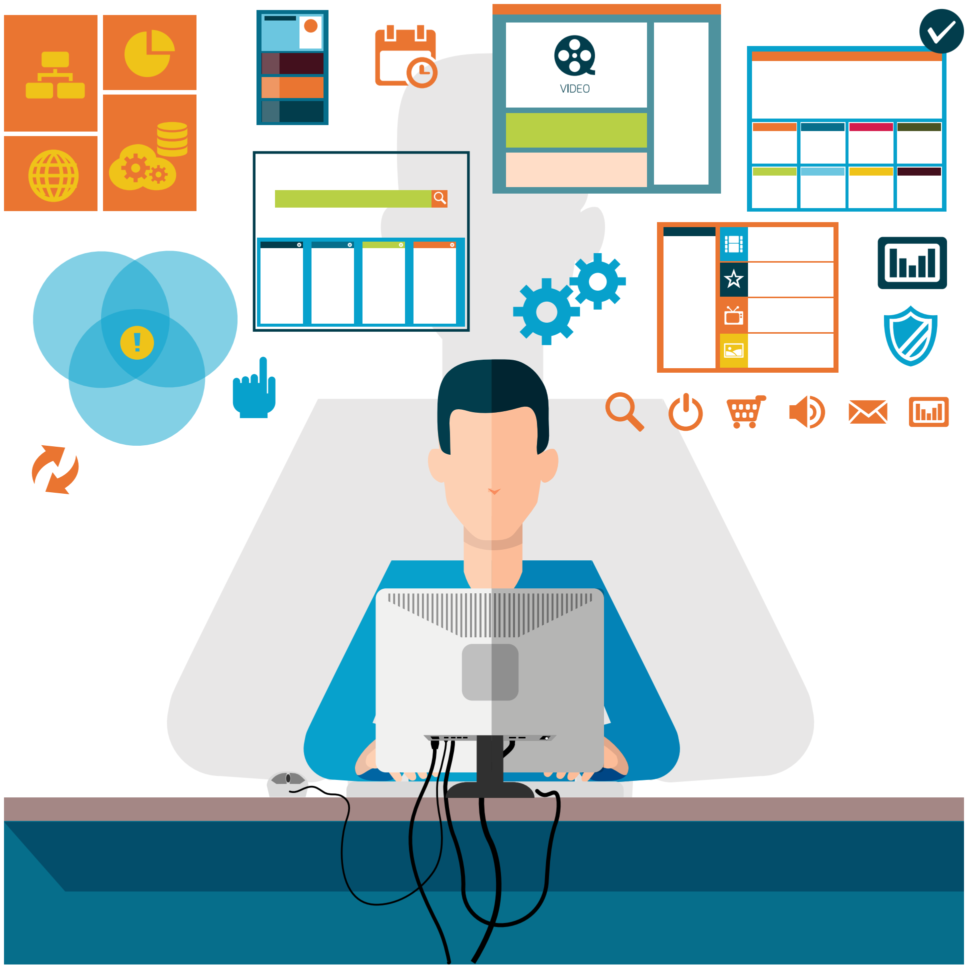
 

## Inbound Tactics

- Website
  - Personalized content
  - Pop-up offers
  - Sidebar registration-required offers
  - Live chat
- Blog
- Social (customized to channels your targets use)
- Influencer media outlets

## Outbound Tactics

- Third-party content marketing – to acquire individual leads and known ID info
- IP ad targeting and retargeting – to raise brand awareness throughout targeted accounts
- Email – mostly used for nurturing named-account leads
- PPC (search and social)
- Telemarketing
- Appointment-setting (executed internally or via a third-party firm)
- Buying signal responses
  - LinkedIn Sales Navigator alerts
  - FirstRain alerts
  - Signals from prospect database services such as RainKing
- Direct mail
  - Postcards
  - Second-day air packages



# DAILY/WEEKLY SUPPORT CHECKLIST

## Introduction

After you acquire leads from targeted personas among your named accounts (via both outbound and inbound demand gen efforts), you'll likely be injecting them into tailored marketing automation nurture tracks to ensure the right messaging cadence based on Worksheets E and F.

The strongest ABM programs, however, align closely with sales to ensure automated, personalized messaging is supported by structured sales team efforts. The following checklists outline the steps high-performing sales reps take to bolster marketing efforts on a daily and monthly basis.

Use and customize this checklist to direct the consistent, comprehensive execution from your sales representatives against their named account targets.

### Daily

- ☑ Read news from your assigned Named Accounts (via Google Alerts, First Rain, LinkedIn and other tools)
- ☑ Read and respond to individual trigger events and news from Named Account decision makers (from LinkedIn, Google Alerts, Newsle and other tools)
- ☑ Interact with social updates from your Named Account individuals (favorite/ retweet their Twitter updates, favorite or respond to LinkedIn updates, etc.)
- ☑ Scan key "trades" for relevant articles
- ☑ Post interesting third-party articles into your LinkedIn updates, Twitter feeds

### Weekly

- ☑ Look for new individuals or decision-makers within your Named Accounts; get introductions and engage where appropriate
- ☑ Identify and start following any industry-specific hashtags (including upcoming conferences) to both engage with Named Account targets and find new content to curate/share with them via your email and social channels
- ☑ Look at last week's meetings and presentations; add any new Named Account targets to LinkedIn; follow on Twitter; add them to your Twitter lists of Named Account targets to follow via HootSuite

*Step 4*

# Account-Based Marketing Software & Tools

It’s possible to execute an ABM program manually, but with all the marketing technologies available today, that’s pretty much like bringing a knife to a gunfight.

Many marketers, however, aren’t aware of all the technologies available to initiate, manage and optimize a successful ABM program. While new technology capabilities are launched on nearly a monthly basis, the following list of six tools will be the foundational ABM technologies in 2016.

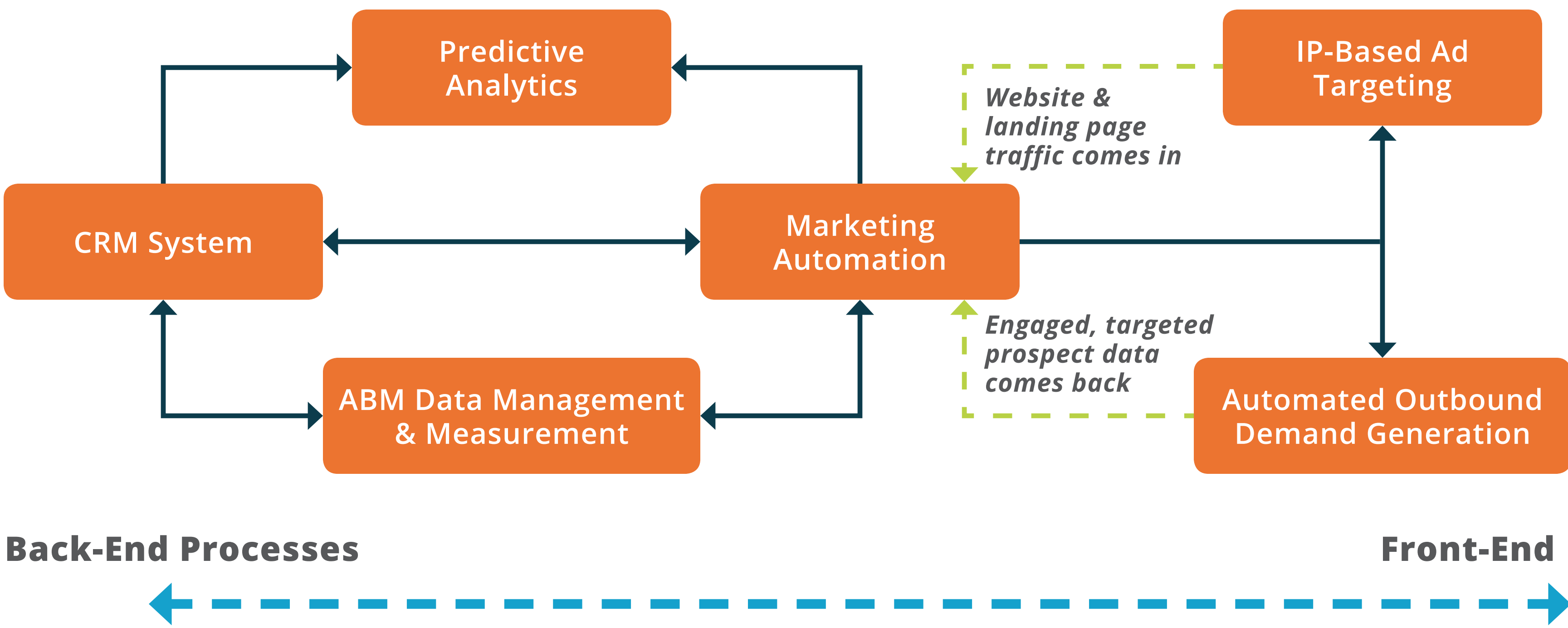
# CRM & MARKETING AUTOMATION

Combined, these two platforms act as the two central hubs of your account-based marketing stack. They store all your customer and program data that drives the entire network of your marketing technologies and processes.

The CRM is the central hub of customer data, powering sales and supporting back-end performance reporting used by marketing to adjust its strategies, programs and tactics – namely via marketing automation systems integrations. Marketing automation systems leverage customer and prospect data (via CRM integrations) and marketing performance information to deliver messaging, control the cadence of communications through nurture tracks, score account/prospect readiness and report on ABM program marketing effectiveness.

Both CRM and marketing automation systems connect to a number of auxiliary technologies. And without these systems properly in place and integrated, none of the other ABM tools could properly do their job.

## *High-Level ABM Tech Diagram*




*Integrations between systems can vary greatly based on organizational strategies and specific needs. This diagram outlines very common integrations between the ABM systems discussed.*

# PREDICTIVE ANALYTICS

Predictive analytics technologies take all available data from your existing database(s) (e.g., CRM, marketing automation, blogs, websites, landing pages, etc.) as well as external sources (e.g., government sites, social media channels) and use configurable algorithms to define:

- The firmographic and behavioral characteristics of your most valuable "closed-won" accounts
- The personas of individual decision-makers in those organizations
- The content that resonated with them

Predictive analytics essentially acts as your intelligence tool, providing you the information you need to devise ABM tactics. It enables you to score and segment your customer base on any attribute, such as company-growth indicators, social activity, technology usage, funding events, credit score, job data and more. With this knowledge, you can then create a realistic plan by pinpointing the types of accounts your organization is likely to successfully close.

# ACCOUNT(IP-BASED) AD TARGETING

These technologies place your ads across leading exchanges and publishers, targeting only the IP addresses of companies on your account list. The great thing about this technology is that it prevents ad budget from being wasted on impressions or clicks with unwanted companies.

Most of these vendors allow you to select which ads are shown to targeted accounts across mobile, display, social and video. IP-based targeting thus ensures all decision-makers at an account see your content, not just the ones you happen to have information on.

# AUTOMATED OUTBOUND DEMAND GEN

Complementing account-targeting ad technology, automated outbound demand gen technology enables you to engage the individual decision-makers at targeted companies with your thought leadership and other longer-form content.

IP-targeted ads are important for brand awareness and ensuring breadth of engagement across the targeted account. But unless the decision-makers at these accounts make the move to visit your website, you won't gain any known ID information (prospect data such as email, job title, etc.) required for further account nurturing.

Automated outbound demand gen helps you get this known ID prospect data without relying on decision-makers to come to you – instead, your content goes to where they're having relevant conversations, where you can then acquire their info and inject it into your marketing automation nurture tracks and CRM system.

# ACCOUNT DATA MANAGEMENT & MEASUREMENT

This technology pulls together all the various data acquired during your ABM programs to form a holistic picture. It does this by associating leads to accounts and passing account details to your unconverted prospects. It then segments account details like owner, active opportunity, customer, products purchased, sales stage, target account or strategic account, etc.

Creating this big picture of all ABM programs, ABM data management and measurement software ensures the usability of all the data you collect. Moreover, it helps align marketing and sales efforts by providing sales reps with the data they need to assist prospects further down the purchase cycle.

# WHAT NOT TO FORGET

Tech won't do everything. Setting appropriate goals, KPIs and benchmarks is paramount, as is understanding individual personas and developing content that resonates with them. Perhaps most importantly, successful ABM strategies depend on proper integration between sales and marketing. Without such integrated processes, data and goals, marketing teams can't get the info they need to adequately identify and engage targeted-accounts, and the buyer's journey will suffer from a disjointed transition of accounts from marketing to sales reps.

# WORKSHEET G: ABM TECHNOLOGY TOOLS & VENDORS CHECKLIST

## *How to Use Worksheet G*

Worksheet G lists the seven key ABM tech categories as they stand today, outlines their main values as discussed above, and highlights the primary vendors in each category. The final column "Adoption Schedule" is meant to guide your 2016 marketing tech road map. The best technology roll-outs result from a well-planned schedule that ensures smooth system integrations, comprehensive user training and practice, and adequate ramp-up time.

It's also a good idea to create a marketing tech blueprint in advance of any technology adoption. This allows you to visualize your growing technology stack and prioritize investments and integrations, and also provides a helpful tool for getting necessary buy-in from all stakeholders.

| TECHNOLOGY CATEGORY | VALUE | KEY VENDORS | ADOPTION SCHEDULE |
|---|---|---|---|
| CRM | Central hub of customer data. Powers sales and much of marketing. | Salesforce; Sugar CRM; Microsoft Dynamics; Netsuite | Current System |
| Marketing Automation | Central hub of marketing data. Steers the coarse of marketing efforts and is primary platform with which most marketing techs are integrated. | Marketo; Oracle Marketing Cloud; Infusionsoft; Pardot; Hubspot | Current System |
| Predictive Analytics | Acts as your intelligence tool, providing the data you need to devise ABM tactics. | Lattice Engines; Mintigo; 6Sense; Leadspace; Infer; Radius; SalesPredict; Everstring | Jan-16 |
| IP-Based Ad Targeting | Places your ads across leading exchanges and publishers, targeting only the IP addresses of companies on your account list. | Demandbase; Terminus; Vendemore | Mar-16 |
| Automated Outbound Demand Gen | Enables you to engage the individual decision-makers at targeted companies with your thought leadership and other longer-form content. | Integrate | Mar-16 |
| Website Personalization | Tracks the sources and actions of targeted account personas when they come to your website and provides personalized experiences according to the visitor's intent and characteristics. | Evergage; Triblio; Get Smart Content | June-16 |
| Account-Data-Management & Measurement | Pulls together all data acquired from ABM programs to form a holistic picture. | Lean Data; Engagio | Aug-16 |

# WORKSHEET H: ABM VENDOR VETTING CHECKLIST/SCORECARD

## *How to Use Worksheet H*

While there never seems to be enough time to perform an adequate marketing tech vetting process these days, any time spent qualifying the best solutions and vendors will save your team time, effort and budget down the road.

Worksheet H lists six information sources that you can and should consult during each vendor evaluation process. You'll want to combine various information sources in a way that provides you with a well-rounded view to make educated decisions and wise tech investments.

Use the checklist as both a guide and as a scorecard, inserting notes beside each vendor and under each information source. Worksheet H provides a couple examples to help you get started.

| TECHNOLOGY CATEGORY | VENDOR NAME | CONSULTANCY/ ANALYST REPORT | MARTECH INFLUENCERS | PEER ADVICE/ INSIGHTS | CURRENT MARTECH PARTNER ADVICE | VENDOR WEBSITE/ CONTENT | VENDOR PRODUCT DEMO |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| | | | | | | | |

***Be a better demand marketer.***

Integrate is a marketing software provider on a mission to arm demand marketers with the tools, insights and integrations required to change the way they execute demand generation. Integrate's software enables demand gen and marketing ops pros to manage the lifecycle of outbound demand generation programs and seamlessly connect resulting data with marketing automation systems – including Oracle Eloqua, Marketo and Pardot. The end results are more efficient marketing organizations; cleaner, faster prospect data; and increased marketing ROI. Visit **www.integrate.com** or follow **@integrate** to learn why innovative companies like TIBCO, DocuSign, Dell, Five9, Iron Mountain and CA Technologies, Inc. trust Integrate.

For more information, contact us at: 866-478-0326 | requests@integrate.com

Established in 2008, Heinz Marketing, Inc., is a B2B sales and marketing firm located in Redmond, WA. With 8 employees, the firm serves businesses throughout North America and overseas. Heinz Marketing focuses on driving results through strategic demand generation, disciplined sales funnel strategies, fully-integrated campaigns and collaboration between marketing and sales organizations.

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