

Do you need to assess if Account-Based Marketing (ABM) is the correct B2B marketing strategy to drive sales growth for your company this year? Here is relevant content from our webinar series: [What Do B2B Marketers Do Now?](#)

Below is an excerpt from our recent webinar: [Are You Ready for B2B Account-Based Marketing?](#) In this short webinar excerpt, our featured guest, Alisa investigates: [B2B Account-Based Marketing Success or Failure: The Determining Factors – Part 2](#)

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**Rick:** Hello, everyone. Do you need to assess if Account-Based Marketing or ABM is the correct B2B marketing strategy to drive sales growth for your company this year? I'm Rick Endrulat, President of Virtual Causeway and we produce the insightful series, *What Do B2B Marketers Do Now?* I know everyone's busy. So today I have a segment from our recent webinar, "Are You Ready for B2B Account-Based Marketing?" Our featured guest in that webinar is Alisa Groockock, VP, Principal Analyst of Demand Generation and ABM at Forrester. In this webinar segment, Alisa is addressing the final three of the five critical requirements that determine ABMs success. Discover what it takes to target the right people at the right companies and maximize your ROI. So let's join Alisa now.

**Alisa:** Now, one of the things that you really want to look at for ABM is what does that relationship between marketing and sales look like? Are there shared metrics and are there SLAs in place regardless of ABM? So a lot of the things that we're talking about today, really, they may get enhanced by Account-Based Marketing, but they're almost like fundamentals, underlying things that should probably be in place, whether you have ABM or not. And this is an example of that, having shared metrics, having SLAs in place, knowing when to BDR something, when marketing, hand something over to a BDR that that's going to get followed up on within a particular time frame, that scoring is well understood and those SLAs are in place. Really, really important because

otherwise, as I'm sure everybody who's listening to this call knows, you end up with misaligned expectations if you don't have those kinds of shared metrics and SLAs in place. Another really important readiness factor is to know what kinds of capabilities exist in the sales organization named account development is mostly referring to non quota bearing. I'll call them XDRs. They're sometimes BDRs, they're sometimes SDRs. We encourage clients to think about something called ADRs Account Development Reps, which is fundamentally really different actually, than the way because BDRs and SDRs have typically operated. And what I mean by that is ADR role is not just about qualifying accounts, it's really about getting at, that buying group notion.

**Alisa:** It's about looking at an account, understanding where the opportunities might exist within that account. And sometimes they it's a really big corporation that you're selling into. There might be three or four or eight or 10 opportunities across that account. What do those opportunities look like? And then that ADR, that account development rep or a BDR that's been trained to do this can then start to look at the people who are engaging, whether they're engaging them through, calling out on them, or whether those people are inbound, engaging on a website or whatever the engagement looks like. And they start to connect to those people around an opportunity and you start to create a buying group view. And then they're passing that whole opportunity on with the people who are engaged, the key decision makers who are engaged, hopefully the key decision makers passing that whole opportunity on to maybe a sales rep who's going to go then execute with all of this insight that's been passed along to them and technologies like intent monitoring and things like that can play a role as well. So that's what we mean by a named account development. And it's a very different role than almost the most of our clients have in place today. And so we help them build that named account is not so new. Most of our clients have some sort of named account selling in place already.

**Alisa:** And if they don't, we'll help them build those capabilities so that you end up with reps that that know how to take a relatively small patch of accounts and sell in a fairly complex way across these complex buying groups and can really work it with a relatively small patch of accounts. Sales execution assets is really around sales enablement. So is there an ability to support a play, let's call it, and be able to provide information about the audience and the buying group and what their needs are? And do the development reps, the account development reps, the buyers, whatever they are in

your organization and the account executives and anyone who's in that sales role, what is the capability to be able to give those folks assets and to train them up on those assets? Does that capability exist in your organization? That's an important readiness factor. And then finally, the sales talent kind of goes without saying in terms of being able to have the right skills and the right experience. If these things are not in place, you need to stop and work on them before you actually jump into a full bore ABM program or at least parallel process. We'll talk a little bit more about strategies based on where you kind of get out on some of these readiness factors.

**Alisa:** But those are some really important ones. So secure commitment from sales leadership on any org changes that may be needed. If you're going to put account development reps in place, you need your sales leadership on board with that and work with if there's a sales enablement team in your organization, have them inventory the assets that you have to support sales and then come up with a plan for kind of filling those gaps. The next category, technology and insights, readiness. So data, everyone knows what data is, but the data that's really important for an Account-Based Marketing effort that you want to make sure is in place at a at a at a ground level or things like thermographic, most of you probably have pretty good thermographic data in place because that's relatively easy to get. That's industries. What geography's a company or in employee size, those sorts of things. The next three categories become trickier. What do you know about buying groups, for example, job titles, the department that a person might be in, how that job title relates to other job titles within that department. And so you can begin to pull together this buying group view that gets a whole lot trickier, especially if you're trying to do it at scale, things like buying signals or people coming to our website. What does that first party intent we call it, what does that look like? What about signals out on the internet? There are now technologies, as I'm sure many people know, that can sort of watch Web behavior in particular categories that might be relevant for your business.

**Alisa:** So do you have that data? Do you have the ability to capture that data? And then there's a whole integration piece here, which is where most of our clients get tripped up. They may have different pieces of data coming in, but they don't really have a strategy for integrating at all. So those are really important readiness kind of enablers. Analytics is the ability to look at that data and assess whether that data is of good enough quality, that you can work with it and then start to develop insights based on it to interpret that

data and to put it out there in a way that can be visualized easily. So you can kind of take action on it. Then what you've got the data and you've analyzed it, visualized it, and you kind of know what that looks like. And hopefully all of this is being done in an automated way with the right technologies and tools. Then how do you then take content that you have and the programs that you've set up and deliver the right things to the right people at the right time? Right? And we call that execution for known scenarios when certain things happen with particular buyers.

**Alisa:** As part of your buying group, how do we respond? What do we deliver and how do we do that across a buyer's journey? And so the delivery part of it used to be kind of orchestration. Delivery has historically been together in like a marketing automation platform. But increasingly those things are being pulled apart where they're actually purpose-built orchestration platforms that just focus on delivering the right content to the right people and the actual delivery of the content, the transport we call it, actually happens in a different technology or different tool. So all of this gets into what is your tech stack look like? Do you have the ability to do the things you need to do? And so our biggest tip that we give our clients is don't just go buy a bunch of technology stock, take a step back and make sure you have a business requirements document. You create requirements, documents. When you build products, you should do the same thing, when you're building a new transformative program like account based marketing, you should have a business requirements document that your ABM or your demand and leader or your marketing department, whoever is going to be in charge of this effort, should be putting together and then working very closely with the marketing operations team to figure out of those requirements. Which ones do we have capabilities to do right now and which ones do we need to build out over time? And what will that cost and what are the tradeoffs? And do we want to make those investments or not and so forth.

**Alisa:** So those are the things that we recommend to our clients there. And then finally, category five is resourcing adequacy. So budget people skills. All this is pretty intuitive. But let me touch on a couple of key things here. The budget, you need to have a budget available for Account-Based Marketing. Now, you can you can move budget, of course, away from something else to be able to do ABAM. But typically it is going to require investments. And all the things we've talked about today, potentially content, potentially new selling resources, might require a new Account-Based Marketing leader to kind of put these efforts together. So there's there's budget that you might need to move or you

might need to get new. And the proportionality piece is important because you want to make sure that you're not putting too much budget into accounts that that are not necessarily your whale accounts. The more budget you put towards something, the more you need to know that the return is going to be really, really high. And it comes back to that demand spectrum that I shared earlier. So thinking about budget in a proportionality perspective, the people I've talked about already need to make sure that there's a leader identified for account based marketing as well as an extended team.

**Alisa:** So that means that people's day jobs will continue as is. You're going to have content people and portfolio marketing people and sales. People in all sorts of people that are doing their jobs, but they need to be willing to carve out some portion of their time to be part of an Account-Based Marketing extended team or just typically doesn't work. It's a team sport. And then, of course, skills. So capabilities, hiring and training. Some of our clients will actually build out an ABMs. And so we'll have conversations with them about what is the right skill set, because a company's marketing is pretty different than field marketing. A lot of our field marketing folks want to do Account-Based Marketing, and that's fine. But there are definitely some analytical skills, some leadership skills, the ability to understand all these digital technologies. There's there's just it's kind of a little bit of a new world for many of our clients in terms of how do they retool or upscale, maybe folks that might be in field marketing or in their demand generation team. How do they make sure that those people then work with the field? So there's a lot of ways to skin the cat, but ABM requires kind of a combination, a mix of skills that's a little bit unusual.

**Alisa:** And some of our clients have to be purposeful in how they build for that. So a couple of tips here. First of all, conduct benchmarks to figure out what the industry averages are. So it's really important to look within your own company in terms of what your internal benchmarks are, what have a baseline, but also to look at what are other clients, what are other companies doing when they start applying budget and people to an ABM effort? What does that look like? How many people are they putting towards it? How many what are they doing in order to get a pilot off the ground? And then what are they doing when they move into more of an expansion mode? What kinds of people and budget does that actually require? And then I talked a little bit earlier about coverage by other teams. So marketing technology is usually the biggest ticket item for getting ABM going. And so this is really a time when you want to make sure you've got the right

resources in place, the right tech stack, or the ability to actually invest in technologies where you may have gaps in your tech stack today. So I'll pause for a moment, I know, Rick, there may have been some discussion and some thoughts around this notion of a pilot, which I've alluded to a couple of times. So let's take a moment to talk about that.

**Rick:** Yeah. And, Alisa, I definitely appreciate your remarks and the comments about pilot programs. I mean, the whole topic of ABM for a lot of clients, no matter how large, you know, from small companies to large enterprises, can still feel pretty overwhelming in our experience with clients. We found that a pilot is in a lot of ways, a great way for an organization to test the idea and some of the strategy and some of those assumptions before investing significant resources to test the waters a little bit before you go and put a lot more resources into it. We found that pilots can actually be a good opportunity to make some discoveries that sometimes allow you to make changes that could result in increased success as you start moving forward. But some of those changes that you might find early on and then you might need to reset. Do you have any other tips for making a pilot successful or a better learning experience for an organization?

**Alisa:** Sure, yeah. Great question. So I think there's two pieces of advice I would give that I do give to clients who are getting pilots off the ground. The first is sort of this. I use this analogy of starting blocks like you're a runner and you need to get out of the starting blocks. Right? So the question I always ask clients is, what do you need to get out of the starting blocks of your pilot and no more. So don't throw too many resources at this right now. Don't make it overly complex. Don't try to solve world hunger. Keep your scope small because that's where clients tend to get tripped up. I would like to see clients if they're going to add any complexity to their pilot. I'd rather see them add complexity in terms of covering the buyer's journey as opposed to complexity with trying to go global or trying to cover a whole bunch of different vertical industries. Right? Keep the scope relatively small so that you reduce the complexity in that way. And then you can focus your pilot. You can spend less time doing a lot of internal selling of trying to get people in 10 different countries, in five different regions on board with the pilot, because that's where I see clients get really bogged down. Right? So keep the scope small in your pilot pick one country, pick one region, you know, focus on one or two solutions or a very relatively small set of accounts. Reduce your complexity there. But make sure that you then are piloting something that has a little bit of complexity in terms



of the buyer's journey, so move beyond paid media and advertising, right? Because just doing account based digital display advertising instead of the traditional advertising you were doing before.

**Alisa:** I mean, it's good. So it's OK, but it's not great. And I have a lot of clients say I ran my pilot. We did this account based digital display advertising. Hurray, we're ready to scale. And when I say to them, it's not so much, you need to slow down. I mean, that's one that's one technology that does something at the very front end of the funnel in terms of doing a little bit better advertising than you were doing before. And you're doing it to a small group of accounts. That's great. That's a good start. But what about how you're engaging clients in the content you're delivering and how you're enabling your sales team and how you're reporting and scoring? So reduce the complexity in terms of the scope, but increase the complexity just enough so that you're trying and testing some new innovative things. And you can really declare success in your pilot on some compelling new things that are actually going to move the needle. And that's tricky. Finding that balance is very tricky, knowing what it takes to get out of the starting blocks. But no more is really different for each organization. And it's a kind of a nuanced it's sort of a nuanced conversation. So, yeah, I don't have any magic bullets there, but, you know, reduce complexity where you can but increase the complexity when it comes to, like, the innovative things that you're doing so that you can really declare success. That's that would be my biggest advice there.

**Rick:** I hope you found that segment helpful. I'd be happy to send you the link to the full webinar playback and the related research brief that goes along with it. You can email us at [info@v-causeway.com](mailto:info@v-causeway.com) or drop by our [website](#).

And I want to say that while the content of that webinar is really important, it may not be the most important growth strategy for your business right now. At Virtual Causeway, we've identified several B2B growth strategies. So let's schedule some time when we can figure out the One Big Thing that will have the most impact right now in our Strategy Session with you we'll investigate the sales and marketing challenges you're currently facing, utilizing tools to discover your current customer experience and map these findings to a spectrum of potential growth strategies to identify that One Big Thing that will have the most impact right now. I look forward to arranging a strategy session with

you to identify that One Big Thing so you can accomplish all of your growth objectives.  
You can reach me at **866-211-6549**. Let's talk soon and have a great day.