Success in ABM Campaign Planning:
A Workbook

Planning and implementing an account-based marketing campaign can be a massive undertaking – we will not downplay that. However, with the right steps in place, marketers CAN make it happen. Yes, even for multiple accounts at the same time.

The purpose of this workbook is to guide you through the stages of how to successfully set up and run an ABM campaign (or multiple for your clients).

ARE YOU READY? BUCKLE IN.

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Define Your Foundation

Before you begin, make sure you understand ABM as a whole, and if your client has the foundation necessary to move forward.

Remember the guide "Demystifying Account-Based Marketing"? It outlines the ways that organizations should change their mindset from lead-centric to account-centric targeting, and the advantages of ABM, such as its effectiveness in B2B environments, alignment of sales and marketing processes, personalization in content, and ability to target individual decision makers.

If you need to revisit these foundational elements, download our eBook, Demystifying Account-Based Marketing, or use the following guide to determine which clients are a good fit.

Organizations that should implement ABM:

Their products/services are costly

When a company sells expensive items or services, they typically have longer sales cycles, and it takes a strategic approach to build trust and get to the right decision makers.

They can refine a list of prospects

This means they likely have a niche audience that they know could be ideal customers, so marketing and sales can narrow a list of the top accounts that they want to pursue through a variety of channels.

They sell to a committee of decision makers

In many B2B organizations, the decision to invest in large purchases is made by multiple stakeholders, so you should be able to target them individually and as a unit/organization as you move them through the pipeline.

YOUR TURN

List your clients that are a good fit for ABM right now:

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Just because a client organization is a good fit based on the basic criteria does not always mean they're ready to implement ABM.

Yes, ABM can increase deal sizes, boost collaboration, and improve sales velocity, but it must be backed by an account-based mindset across the organization, because it requires team buy in and the right strategy and internal infrastructure to make it happen.

Organizations that should have internal infrastructure for ABM:

They have defined roles in marketing and sales

Although not impossible, it will be difficult for you to run effective ABM campaigns without roles within your client's organization who will run point on marketing and sales tasks to keep the campaigns running smoothly.

They already have a library of content

ABM doesn't live in a silo. It complements your other ongoing marketing efforts, such as content marketing, social media campaigns, email marketing, and any other channels that are highly relevant for your clients' personas. You can use existing content to drive conversions within ABM while creating new assets along the way as needed.

DO YOU HAVE AT LEAST ONE CLIENT THAT IS READY TO BEGIN PLANNING AN ABM CAMPAIGN?

IF YES

Move forward in the workbook.

IF NO

It's time to have some conversations about getting the right infrastructure in place to make sure ABM is the right fit. Either way, you can use the upcoming information to create a framework for ABM campaign planning.

They can create an ABM task force

This is typically at least one marketer and one salesperson within the client's organization that markets and sells to the refined list of target accounts. You will partner directly with this team to move campaigns forward and scale as it becomes feasible.

YOUR TURN

Within the clients you listed that are a good fit for ABM, which ones have the internal infrastructure, and who would you choose to partner with from the sales and marketing teams to create an ABM Task Force?

STAGE 2

Narrow Your Targets + Channels

Now that you have identified the ideal client(s) to launch ABM campaigns, it's time to get into the nitty gritty.

You'll have to work directly with the client ABM Task Force on this, so make sure you know exactly what you're asking for along the way.

ABM Campaign Planning:

Choose Target Accounts

The Task Force needs to narrow down the accounts that they want to target and define their metrics for success. To do so, marketing and sales teams need to align on where to focus.

ASK YOUR TASK FORCE THESE QUESTIONS:

- What high-value accounts are your inbound channels already attracting?
  Hint: Look at website visitors or other factors.

- What open deals would you like to move faster?
  Hint: Look at current deals that are high value but have hit a wall.

- What are the 10 biggest deals you've closed recently? Is there more value you could provide those accounts to re-sell, cross-sell or up-sell?
  Hint: Look at historical deals to see who might be a good fit.

- Are there any companies out there that you'd like to be doing business with?
  Hint: These might be your dream or ideal clients whose logos you'd love to have on your customer list, but make sure they're obtainable and grow as you go.

- What traits do your best customers have in common?
  Hint: Look at your Ideal Customer Profile, or ICP, and find more companies with those traits.

THERE'S NO PERFECT WAY TO START, BUT MANY COMPANIES START WITH 50 ACCOUNTS AND TEST.

However, the list should fit the size of your client. Typically, one salesperson should be aligned to about 10 accounts during an ABM campaign.

YOUR TURN

Set a meeting with your client Task Force to define metrics and align sales and marketing goals for this campaign, then assign them "homework" to choose their target accounts based upon the questions above.

Create Account Segmentation Plans

Here's where you need to make sure that your client's sales and marketing teams are collaborating effectively. They will map out the roles that they need to attract and determine what types of content will be beneficial for higher conversion rates.

HERE'S A TYPICAL BUYING COMMITTEE AT A B2B ORGANIZATION:

- Decision maker(s)
- Champion
- Budget Holder
- Influencer
- Blocker
- Legal/Compliance
- Executive Sponsor
- End User

Depending on the products or services that your client sells, they should know what roles they typically sell to.

For example, if they're a SaaS company, they will likely try to get contacts in IT or the specific department that their platform will benefit.

Yes, there will be blockers, but there will also be people who see the value, and they will be the helpers. Focus on them to become the ones who champion the message and change the mindset of the buying committee.

You'll have to work directly with the client ABM Task Force on this, so make sure you know exactly what you're asking for along the way.

CONTENT IDEAS TO USE FOR CAMPAIGNS:

- Repurposed content from prior campaigns (white papers, guides, infographics)
- Personalized web content (landing pages that are personalized to their role/needs)
- Events / webinars
- An interactive offer (a demo or assessment)
- Gifts

Remember to identify which portions of the funnel each type of content will align with, because you don't want to invest too much upfront before they're ready to make a purchasing decision. The great thing about ABM content is that personalization is achievable since you're dealing with a small number of accounts.

YOUR TURN

Ask your Task Force if they already have all the types of content, or if some of it still needs to be created. Decide actionable steps and timeline. Then, begin to map out the buying committees within target accounts. Make sure that marketing and sales teams understand how to determine these roles and what types of content are most beneficial.

Target Ads Effectively

Once you have established the ideal channels to promote your business as part of a multi-channel ABM approach, ads are the additional push you need to target your top decision makers where, when, and how you want.

You may be an ad targeting guru, or maybe you're just getting started in the space – either way, it's time to get ahead of the digital advertising game. You should have a way to help simplify your processes and align goals to offer better digital solutions for your clients. That's where BrandGen.io can make your life easier.

NO MATTER HOW MUCH EXPERIENCE YOU HAVE WITH SIMILAR TOOLS IN THE PAST, THIS TOOL CAN INTEGRATE DIRECTLY WITH HUBSPOT AND PROVIDE:

- ABM (Account-Based Marketing)
- Content & Publications Targeting
- Technographic & Intent Targeting
- Location Targeting
- 3rd Party Data Targeting (even after cookies phase out)
- Custom Audiences
- Retargeting

YOUR TURN

What's your level of comfort with ad targeting platforms? Which ones have you used in the past, and are you willing to explore new ones?

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Help your clients improve their bottom line with an easy-to-use tool that aligns sales and marketing processes to accelerate the pipeline.

STAGE 3

Measure & Adjust Your Results

We live in a data-driven world, and to keep your clients impressed, ongoing analytics and adjustments will make the difference in a flat campaign and a dynamic one that drives results.

Here's how to measure reporting, adapt, and optimize your ad campaigns within ABM.

Watch the Data

First, you have to analyze which companies are showing interest and pull any information you can from there. Typically, you will have a lot of segmented data, which will not necessarily show demographics, but more psychographic information. You will begin to see what the audience values, and what they're interested in.

METRICS TO KEEP IN MIND:

- Pageviews and sessions from target accounts
- Conversion rates
- Contacts created at target accounts
- Average cost of conversion

THE MAIN QUESTION TO ASK IS, "WHAT TRAIT IS NOT PERFORMING WELL?" TO SEE IF WE YOU CAN EITHER IMPROVE IT OR DUMP IT.

Pay Attention to Ad Details

In ad targeting, every detail matters. A misworded CTA or copy that doesn't resonate effectively could be the difference between a high-performing ad or a flop. Take a deep dive into what ad sizes, messaging, locations, and publications are performing best. Would adjusting these targeting approaches help you achieve your goals, or would it cause you to choke out the traffic?

REMEMBER TO ONLY TEST ONE CHANGE AT A TIME TO DETERMINE WHAT THE ISSUE IS AND WHERE TO OPTIMIZE.

Maximize the Budget

The final part of ad optimization is fine tuning a bidding strategy. You want to make the most of every client's ad spend, so taking all of the above into consideration, how do we do it on budget? If we're optimized and under budget, which is usually the case in ABM, where can we get more aggressive with the spend?

You could choose one account to target more specifically, or do more testing to ensure you're making the most of every ad. You could also consider tacking on a newly structured retargeting audience for the already engaged accounts. At this point, the choice to "flight" the campaign comes into play. Once you're optimized, turn it off for a week to give it a break, then restart it in a week so the audience has fresher eyes.

Optimizing an ad campaign is an ongoing task – no campaign is perfect, and the more you measure and test, the more you will understand what the audience wants and values. **RINSE AND REPEAT!**

An ABM campaign is not linear; you will start to see ups and downs, but it can be very successful if you keep at it

YOUR TURN

Are you ready to launch a multi-channel ABM campaign? What are the areas where you need the most improvement?

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Now, it's really your turn.

Planning is great, and it's necessary. Now that you have the right elements in place to plan a successful campaign, take the actionable steps to make it happen.

Ready to see exactly how ad targeting works in the BrandGen.io platform? Book a demo to see for yourself!

About BrandGen

BrandGen.io is a self-service digital ABM advertising platform that enables B2B firms and their marketing partners to accelerate sales and drive revenue growth through targeted, cost-effective advertising campaigns.

BrandGen.io builds your brand over the length of your sales cycle while helping you to generate demand at targeted accounts. BrandGen.io is future-proof in that we anticipated the demise of the 3rd party cookie and have developed solutions that enable you to directly reach the buying group at companies that should be your next customers even as 3rd party cookies are deprecated. The tool is designed to make setting up advertising campaigns a breeze, and it's deeply integrated with the HubSpot marketing PaaS to help you to create your leading-edge ABM technology stack.

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