

# Implementing Best Practices in Account-Based Marketing (ABM)

A Best Practices Guide

July 2023

## In This Deck



This deck provides a discussion of best practices in implementing account-based marketing (ABM), as practiced by Callan Consulting. It is intended to provide guidance to sales and marketing leadership regarding the appropriate strategy, tools, and training required to make their ABM efforts as effective as possible.

The Callan Consulting team has over a decade of experience in ABM strategy, pipeline development, and integrated marketing, and is happy to provide this guide for our customers' use.

## ABM Has Emerged as a Key Strategy to Fill Sales Organizations' Funnels

The account-based marketing discipline has emerged and grown in importance in recent years to the point that it has become a critical component of many organizations' go-to-market motions

- ABM allows sales and marketing teams to take a more disciplined, targeted approach to key accounts and to tailor their approach and messaging to these accounts
- With today's ABM tools and best practices, it can be employed even by teams with limited resources
- While ABM was pioneered by technology firms, its use has expanded to other industries.

Using an account-based approach allows organizations to use their sales and marketing resources more effectively and achieve higher close rates



## Implementing ABM Can Make Tremendous Pipeline and Company Impact

Companies using ABM report an  
**80%** improvement in  
company reputation

**71%** of customers expect  
companies to deliver  
personalized, tailored interactions

**76%** of marketers  
saw higher ROI with  
ABM than any other  
marketing strategy

Those selecting targeted  
accounts report a **68%**  
higher account win rate

**58%** of B2B  
marketers report larger  
deal sizes with ABM

*Source: Callan Consulting/TOPO internal research; <https://www.rollworks.com/resources/blog/17-account-based-marketing-statistics>*

## Organizations Are Implementing ABM Today, but Many Are Encountering Challenges

More than **80%** of successful ABM organizations have a strong ICP (vs. 42% of other organizations)

**90%** of organizations who use intent data use it for prioritizing purposes, but 67% are struggling with making it actionable

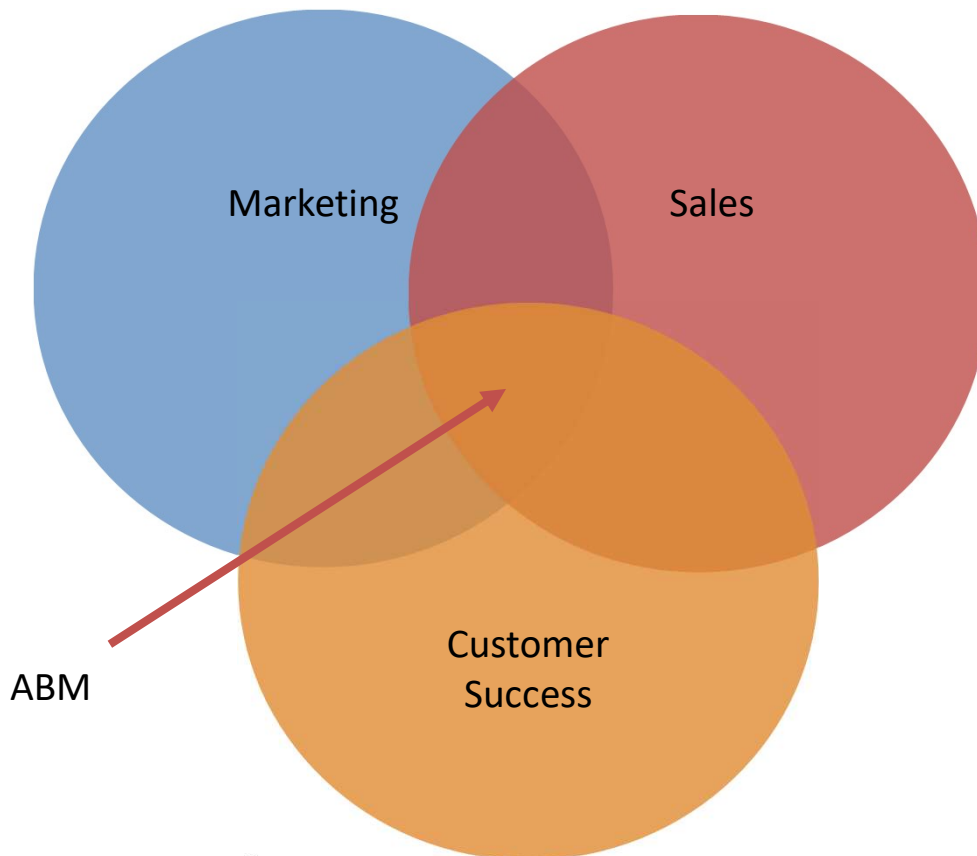
**78%** of leading account-based organizations have implemented intentional account selection processes

**86%** of account-based marketers rate measurement and attribution as important, but many lack clarity on what to measure and how

*Source: Callan Consulting/TOPO internal research*

## Successful ABM Requires Close Coordination Between Sales, Marketing, and Customer Success

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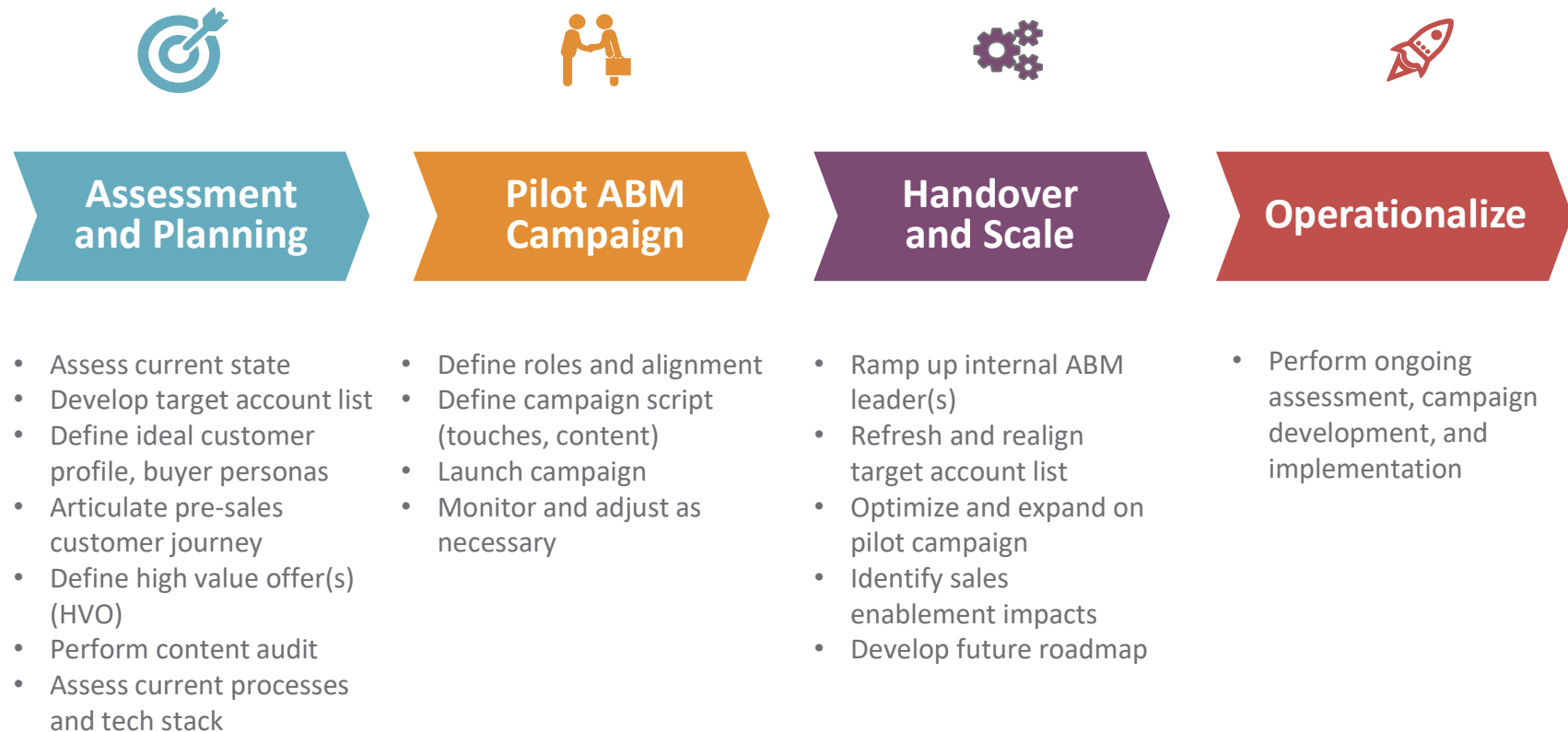


The ABM discipline straddles sales, marketing, and customer success requiring close coordination between the three

While often implemented by marketing in order to fill the sales funnel with more targeted opportunities, sales and customer success are the ultimate owners of the customer relationship and should be highly involved in selecting accounts and identifying ideal customer profiles

## Callan Consulting Takes a Four-Phased Approach to Helping Companies Develop Their ABM Capabilities

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## Phase 1: Rapid Assessment and Optimization

- **Current and Future State Assessment.** This includes interviews with 3-4 team members, reviewing existing materials, and producing a 2-4 page document that outlines the current state of the company's lead generation efforts and what the end state should be.
- **Diagnostic Deal Analysis:** Analysis of Salesforce and other sales/marketing reports to identify items such as where opportunities are generated, where they get stuck, the average contract value.
- **Develop Target Account List.** Working with existing stakeholders, create the target ABM account list.
- **Define High Value Offer (HVO).** Working with existing stakeholders, define compelling and realistic HVOs.
- **Adjust Existing Campaigns.** If the company has any existing campaigns that can be adjusted and improved, assess them and recommend steps to immediately implement.
- **Process Assessment.** Assess the current ABM technology stack, marketing campaign process, and recommend improvements in a 5-7 slide presentation.



# The Assessment Should Follow a Structured Format

CATEGORY	COMPONENT	Current Level of Maturity	Next Level of Maturity	Rationale / Timing
Strategy	Market			
	Go-to-market			
People	Organization			
Process	Process Design			
Technology	Technology			
Tactics	Program Design			
	Offers			
	Orchestration & Plays			
	Channels			
Metrics	Measurement			

EXAMPLE

The Pilot Campaign Serves As a Testbed to Gather Feedback and Optimize ABM Efforts

## Phase 2: Pilot ABM Campaign Launch

- **Role Alignment and Definition.** Create a Roles and Responsibilities document that outlines ABM role functions and best practices.
- **Content Audit.** Work with stakeholders to conduct a content audit for potential ABM-ready content.
- **Launch Pilot Tiered HVO Campaign.** Work with stakeholders to launch a pilot campaign using the tiered account list, HVO, and available content.
- **Tiered Target Account List.** Based on initial learnings, further optimize and tier the target account list.

The Handover and Scaling Phase Ensures Your Team Has All the Required Skills to Succeed

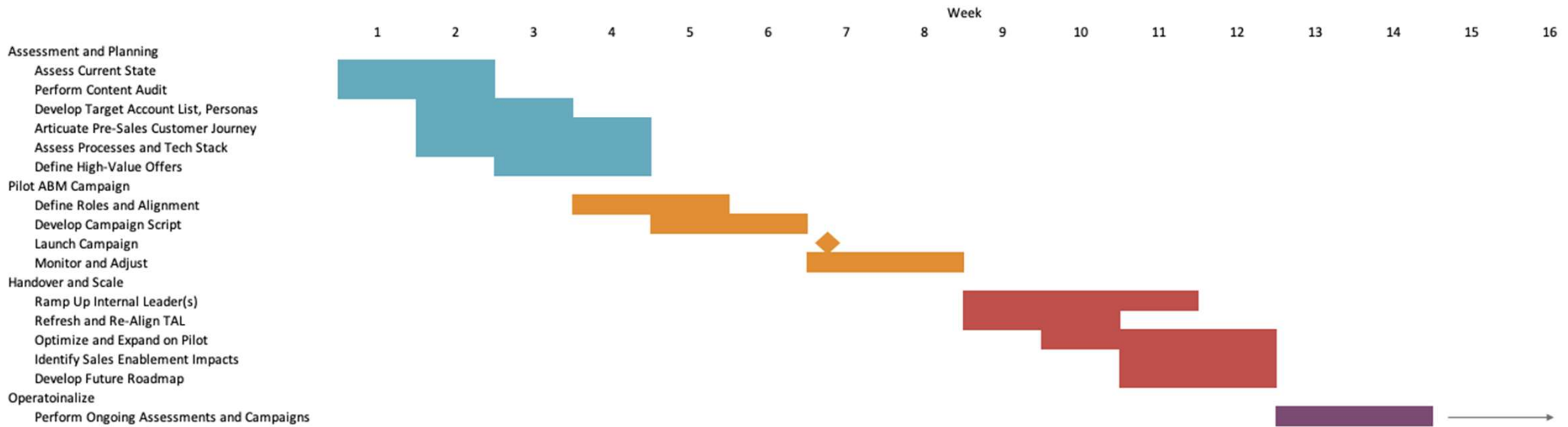
### Phase 3: Refresh and Scale

- **Ramp-up Internal ABM Leader.** Typically, the company has an internal ABM leader identified. This leader will need to be trained on the ins and outs of ABM.
- **Target Account Refresh and Realignment.** The target account list will need to be refreshed based upon learnings.
- **Optimize Tiered Account Campaign and/or Expand Channels.** Work with stakeholders to further optimize the tiered account campaign and/or expand marketing channels for ABM to improve results.
- **Sales Enablement and Personalization.** Key sales enablement materials must be identified and prioritized. The output for this should be a 4-6 slide presentation.
- **Roadmap for Scale, Automation, and Efficiency.** Create a 3-5 slide roadmap presentation that shows where the company needs to go in order to scale ABM and improve automation and efficiency.

## Phase 4: Operationalize and Implement

- **Operationalize and Implement ABM.** Engage with stakeholders to operationalize and implement ABM campaigns. When implemented as a Callan Consulting project, we will provide general support, advice, and implementation deliverables as needed and agreed upon. Callan Consulting typically provides 4-6 hours of consultant time per week over a six-week period for this phase.

# You Should Aim to Get to the Operationalization Phase Within One to Two Quarters





How We Can Help

# Callan Consulting Has Deep Experience Providing Best-in-Class Product ABM Support

## Partial List of Current and Former Clients

Callan Consulting has been providing strategic product marketing services to technology companies since 2000

- Team of former technology marketing executives led by Ed Callan

We have conducted more than 1000 projects to support product marketing teams

- Market opportunity assessments, thought leadership research and materials, launch support, verticalization, white paper/collateral development, competitive intelligence, pricing and packaging, and more



+ **Callan** Consulting

## The Callan Consulting Team Brings Decades of ABM Leadership Experience



**Ed Callan**  
Founder and CEO

- 30+ years of experience in strategic marketing and consulting
- Former CMO at Intershop



**Kevin O'Malley**  
Senior Consultant

- 25+ years of experience in lead generation, ABM, marketing, and consulting
- Expert in ABM, revenue marketing strategy and execution
- Former ABM Lead at Gartner/VP of Marketing at TOPO



**Sherman Griffin**  
Principal Consultant

- 20+ years of experience in marketing strategies, solutions & projects to leading tech companies
- Former marketing leader at Amazon, Real Networks, Pure Networks, and AT&T Internet Services



**Kacyn Goranson**  
Consultant

- 14+ years of B2B marketing experience
- Marketing leader focused on ABM, operational efficiency, revenue generation and growth
- Previous ABM experiences include a 44x ROI on initial investments



**Debbie Bender**  
Consultant

- 20+ years of experience in sales effectiveness, training, and coaching Former TOPO/Gartner analyst covering sales performance improvement and talent development
- PhD in Global Training and Development



## How Should You Get Started?

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Regardless of where you are in your team's ABM journey, whether it's in the planning stage or is already a fully-functioning machine, you will always benefit from bringing new best practices to bear.

The Callan Consulting team is uniquely qualified, with decades of experience running ABM, pipeline marketing, and lead generation functions. We work with both sales and marketing leadership to build strategies, playbooks, onboarding and training to teams in need.

So give us a call. We are here to help.



# Thank You



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