




HOW TO EXECUTE ACCOUNT-BASED MARKETING WITH HUBSPOT

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Don't be a stranger to your ideal customers!

USE ABM TO BUILD RELATIONSHIPS AND CLOSE DEALS FASTER

How well do you know your prospects?

For many SMEs, the majority of prospects they market to are strangers that they are desperately trying to get to know over time.

The problem is, with long sales cycles and often a bunch of competition to contend with, it can be hard to move the revenue dial.

That's where account-based marketing comes in. ABM is a powerful tool in any demand generation marketer's tool belt, especially if your annual contract value (ACV) is high and relative number of opportunities in your market are low.

Because ABM requires tight cooperation between marketing and sales, it is important that all involved have a common understanding of what it is and the tools and techniques needed to ensure ABM success.

So if you're ready to build a strong relationship with the prospects you really want to sell to and generate revenue faster than ever, let's dive in!



Here's what ABM is not

Firstly, in order to help us to understand what ABM is, let's take a look at four things that ABM is not.

1.

Account-based marketing is not a stand-alone practice that is mutually exclusive to other forms of marketing.

It is a framework and a philosophy to place your tactics and strategies within. You can run inbound as a part of ABM. Demand generation can be a component of ABM. Webinars, content campaigns, and in-person events can all be a part of your ABM campaign.

2.

ABM is not demand generation with an account focus.

Demand generation can be a complementary piece of your ABM campaign, but the two are not one and the same.

Demand generation focuses on driving demand rather than leads and requires sales and marketing to work together on lifecycle stage definitions and handoffs, so while it is a natural fit within the ABM framework, it is not the same thing.

3.

ABM and using intent data are not one and the same.

You can run ABM without intent data and you can use intent data without running an ABM play. Intent data helps you gain relevance in any marketing play, when deployed properly, but is not required to be relevant or personalised. ABM has been around since 2003, long before the ZoomInfos and Cognism's of the world were around to tell us our prospect's every move.

4.

Account planning and ABM are not the same thing.

Does ABM involve account planning? Yes. Does every team doing account planning have to run an ABM campaign? No. Account planning is a sales motion that can happen in a silo or in conjunction with marketing in order to market in line with the account planning done by sales.

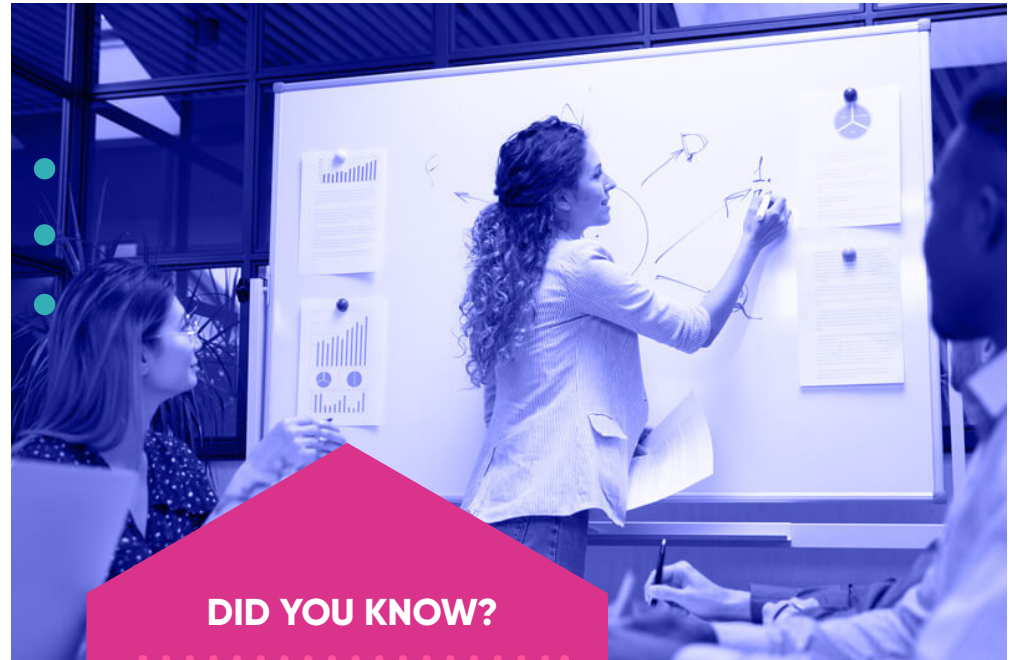
So what is ABM?

Account-based marketing is a hyper-personalised marketing practice that aligns marketing and sales in the pursuit of selling to target accounts. They do this by building value across a segment of stakeholders who make up a buying committee.

By being hyper customer-centric, brands become reliable and trusted by their target accounts.

Since marketing and sales are so closely synced, the customer experience is seamless and relevant to their place in the buyer's journey. From the very first impression at top of funnel (ToFu) to the assets that sales uses in the discovery process and beyond, marketing and sales are in lockstep.

This alignment and customer obsession – as well as the tactics and strategies you deploy – are what make ABM so effective.



DID YOU KNOW?

**According to Rollworks,
87% of marketers say
ABM outperforms other
marketing activities**

ABM acronyms & jargon explained

Marketing and sales are two disciplines full of acronyms and jargon. If you're running an ABM play, it's smart to ensure both teams are clear about what is meant when ABM buzzwords inevitably start getting thrown around. Here are five you want to know:

+ Target Account List (TAL)

This is a list of accounts that you have identified as high-value and will target in your campaigns. This can be done by choosing individual accounts or by using your ICP to find accounts that match those parameters.

+ Ideal Customer Profile (ICP)

The ICP is usually created using a combination of firmographic, technographic, and demographic factors and is an essential guide to whether an individual account is one you should target or not. Many companies use ICP tiers to guide marketing and sales tactics & strategies based on tier or show how valuable the account is to your business.

+ Buying Committee

This is the group of stakeholders that you are seeking to influence within your ABM campaigns because they have a seat at the decision making table. Potential buying committee members include decision makers, influencers, budget holders, blockers, champions, legal, and end users.

+ Surfacing Leads or Handoffs

This is a sales and marketing alignment term that speaks to the timing and mechanisms for putting a lead in front of your sales team. For example, you may put your tier 1 target accounts in front of sales via a task and a Slack notification when the target account has a company score of 100.

+ Sales & Marketing Alignment

Necessary for running ABM plays, sales and marketing alignment involves sales and marketing collaborating on accounts to target, when to hand off those accounts based on ICP tier, lifecycle stage definitions, what content sales should use for various target accounts, and more. Sales and marketing alignment is about breaking down silos and making your revenue team more effective through working together.

What are the benefits of ABM?

ABM offers companies opportunities to enhance their marketing capabilities and drive revenue faster. Let's explore some of the reasons why many of the world's most successful B2B organisations deploy ABM as part of their demand generation efforts:

ABM's targeted nature shortens the sales cycle

By focusing on highly relevant customers for the offering in question, **ABM shortens the typically long B2B sales cycle.**

As ABM focuses on priority accounts, it delivers the critical information prospects need as they progress through the buyer journey. This supercharges the influence and value communications delivered, helping prospects move towards the purchase stage, faster.

Communications and content are personalised to the audience's needs

ABM's hyper-targeted nature means all forms of communication can be optimised for the audience's interests.

As a result, the information shared is typically of high value as it aligns perfectly with the target's challenges and is developed with their specific circumstances in mind.

In short, the more targeted a campaign is, the more value it can deliver, as it covers subjects that are more relevant.



DID YOU KNOW?

80% of marketers say ABM improves customer lifetime values, while 86% say it improves win rates (HubSpot).



Marketing attribution becomes much easier to achieve

One of the greatest challenges faced by marketing is the difficulty in achieving attribution.

As the buying process encompasses so many touchpoints, it can be hard to identify key influencers in the final purchase.

However, with an ABM approach, attribution becomes easier to achieve. With a list of pre-identified target accounts, purchase and engagement activity from these targets can be monitored and easily recorded.

If marketing activity is aimed towards a set number of accounts and one of those accounts turns into a customer, then it's much more accurate to credit marketing activity with that customer, in comparison to trying to attribute industry level marketing activity.

ABM aligns sales and marketing activity

Taking advantage of a cohesive Sales and Marketing team effort, ABM taps into the full potential of inbound marketing and uses a coordinated sales effort to maximise results.

This alignment helps marketing play a key role in closing deals while also helping the sales team by informing them on where and when to act.

Are you ready for the ABM checklist?

For all its benefits, the reality of executing ABM efforts can be complex and for some organisations they just simply won't be set up to do it effectively.

Here are the key questions you need to ask and answer before you embark on your ABM journey:

- ✓ **Do you have a high value product or service** - low value doesn't tend to warrant an ABM approach due to prohibitive cost-of-sale?
- ✓ **Do you have a well structured, usable CRM**, full of the right data (valid email records/telephone contacts etc)?
- ✓ **Have you developed personas** and know the different messaging angles/pain-points and customer needs for multi-stakeholder comms?
- ✓ **Have you got clearly defined criteria** to identify and analyse target accounts?
- ✓ **Can you execute a multi-channel campaign** - is there a sales team who'll be running direct outreach/follow up across the target accounts?
- ✓ **Do you have the budget** - to do this effectively you need to raise awareness for a prolonged period, buy the paid media, drop the tailored direct mail etc.



If you don't match these criteria, it's likely you may not see the results you'd want from your marketing efforts. You are likely to find more success from an inbound marketing focussed approach.

So you're sold on ABM...now what?

Now you understand the core benefits of ABM and whether you are well-equipped to do it, the next step is to look at how to plan a campaign effectively.

The strategy and planning phases of an ABM campaign are without doubt the most important.

They hone in on what customer segments you want to target, what core message you want to communicate, how you will bring those messages to life and what channels you need to use to get in front of your prospects.

Here are the 6 phases of our ABM campaigns:

1

Campaign Strategy

- Define the campaign goals and success metrics.
- Select the target account groups and personas.
- Develop the overall campaign concept.
- Identify the campaign activations (eg. Ebook, webinar, video, blogs, infographics, tools).
- Develop the campaign plan.
- Identify the marketing channels and promotional plan & tactics for the campaign.

2

Campaign Flow & Orchestration Roadmap

- Develop a visual infrastructure of the campaign (the campaign flow).
- Plan how accounts will interact with campaign activations.
- Confirm the marketing and sales systems required and the actions triggered.
- Build out the orchestration roadmap displaying timings for all elements of the campaign.

3

Accounts Prioritisation & Data

- Review CRM data to ensure all required data points are available.
- Based on the target account groups, build lists of the target accounts.
- Going a layer deeper, identify the personas within each of the accounts for targeting.



4

Activations, Messaging & Ads

- Depending on the campaign type work up the campaign activations (e.g. Webinar / Ebook etc).
- Create a campaign messaging framework to align messages across all campaign channels.
- Identify personalisation opportunities wherever possible.
- Design ad creative and landing pages for all marketing channels.

5

Campaign Setup

For each of the marketing channels in the mix, set up the campaigns. This could include:

- Organic social post scheduling.
- Paid campaign setup.
- Build campaign landing pages.
- Webinar set-up.
- Outbound email sequences setup.
- Build reporting dashboards.

6

Campaign Management

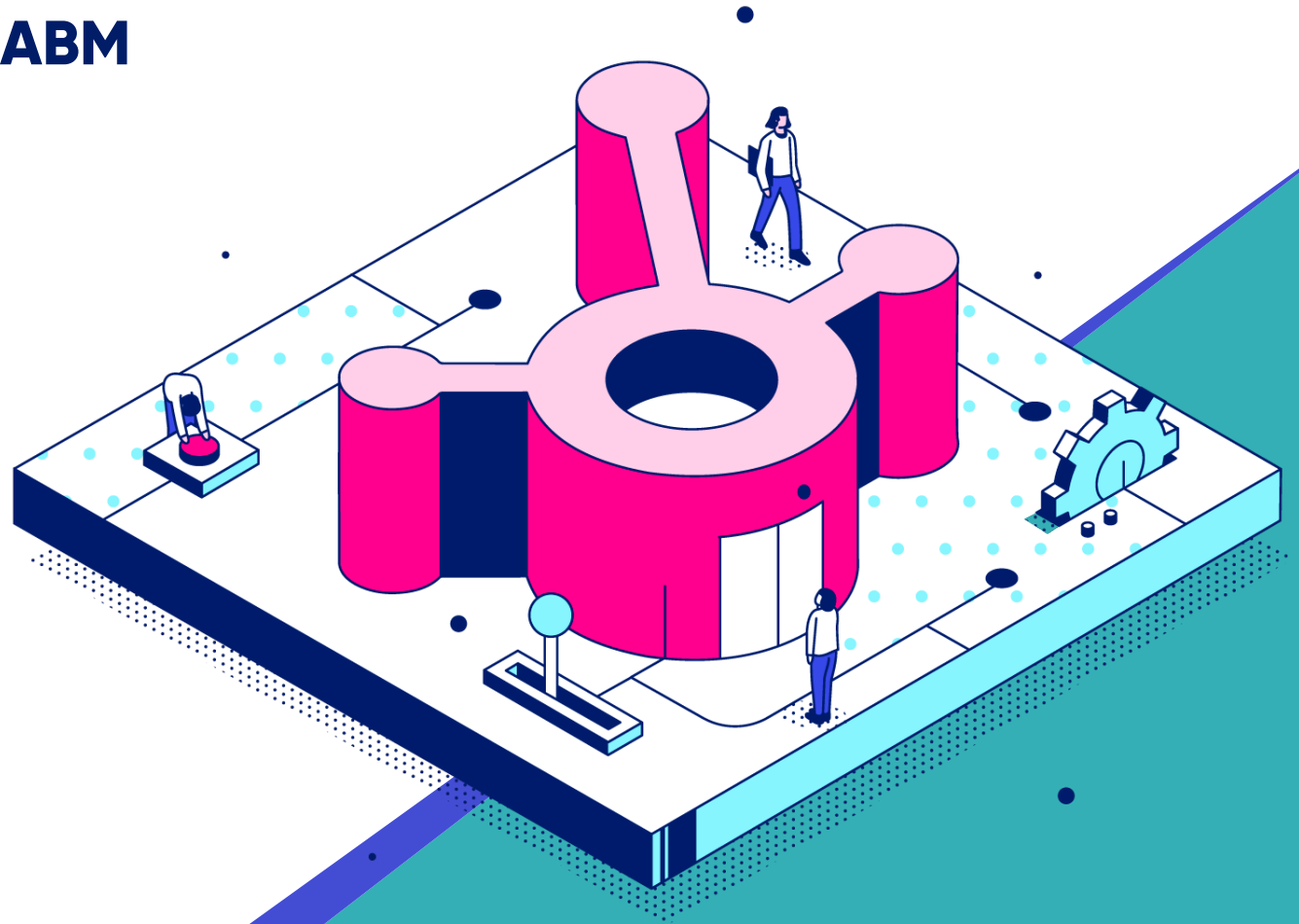
- Actively manage paid campaigns.
- Optimise paid channels to increase performance and decrease cost.
- Review email sequences.
- Report on campaign performance weekly.



Why HubSpot is the Best B2B Platform to start with for ABM

HubSpot was built around the same customer-obsessed ethos from which ABM was born, so it makes sense that it's a natural fit for ABM campaigns.

The HubSpot CRM platform connects all of the data from your sales and marketing efforts while allowing for robust, customer-centric automation and personalisation. With an ABM campaign powered by HubSpot's powerful CRM platform, you're empowered to use data to segment and target your accounts and automation to nurture your buying committee and to hand warm leads over to sales.



But that's not all – check out the following HubSpot features that align with the tenants of successful ABM:



Single Source of Truth

Keep your team in one reliable, trusted tool with a shared view of company, contact, and deal records:

- Shared view of all object records
- ABM tools
- Default ABM properties
- Target accounts home
- AI-powered Target Account recommendations
- Account overview page
- Operations Hub for data cleanliness and consistency



Streamlined Campaign Deployment

Build out your entire strategy in HubSpot for smooth handoffs using native ABM tools:

- Ads – company targeting
- Forms – company properties
- Smart content
- Landing pages
- Campaigns
- Email
- Workflow automations
- Company lists



Integrations Galore

Plentiful integrations to add functionality and customer data to your campaigns:

- Slack for account based collaboration
- Postal.io for offline marketing & gifting
- ZoomInfo for contact enrichment
- Bombora for intent data
- Zoom for webinars
- Clearbit for account enrichment
- LinkedIn Sales Navigator for account planning & building
- Enhanced Salesforce sync for ABM

ABM Tools

Benefit: Align marketing and sales teams around a set of high value accounts that both teams will work together to target, and track progress against those accounts from one place

How to use: Plan your ABM strategy, define your ideal customer profile, and then use Target Accounts to select the companies your team wants to target and track (see next slide for ABM features in depth)

Price tier: MH and SH Pro+ (SHP seats required for sales reps to have access to "Account Overview")



Seamless Handoffs = Seamless Customer Experience

A powerful workflow automation tool to give your customers a seamless experience:

- Advanced sequences
- Company scoring
- Marketing automation: lifecycle stage and lead status management
- Lead rotation
- Tasks and notifications
- Custom behavioural events
- Lead scoring
- Chatbots/live chat
- Default workflows
- Quotes
- Tasks
- Meetings
- Documents
- HubSpot video





Reporting and Revenue Attribution

Attribute your results to your marketing efforts with omni-channel activity tracking:

- Custom reports
- Sales and marketing analytics
- Dashboards for ABM, sales, and marketing
- Conversational intelligence
- Ad conversion events
- Web, ad & social media analytics

The benefits of using HubSpot for account based marketing plays are plentiful. It's the best-in-class platform for ABM for the following reasons:

- Transparency from start to finish to keep teams aligned.
- Personalise the buyer's journey, account by account and buying role by buying role.
- Build out your entire strategy in HubSpot for smooth handoffs using native ABM tools.
- Analyse and iterate on the spot for increased success over time with reporting and analytics.

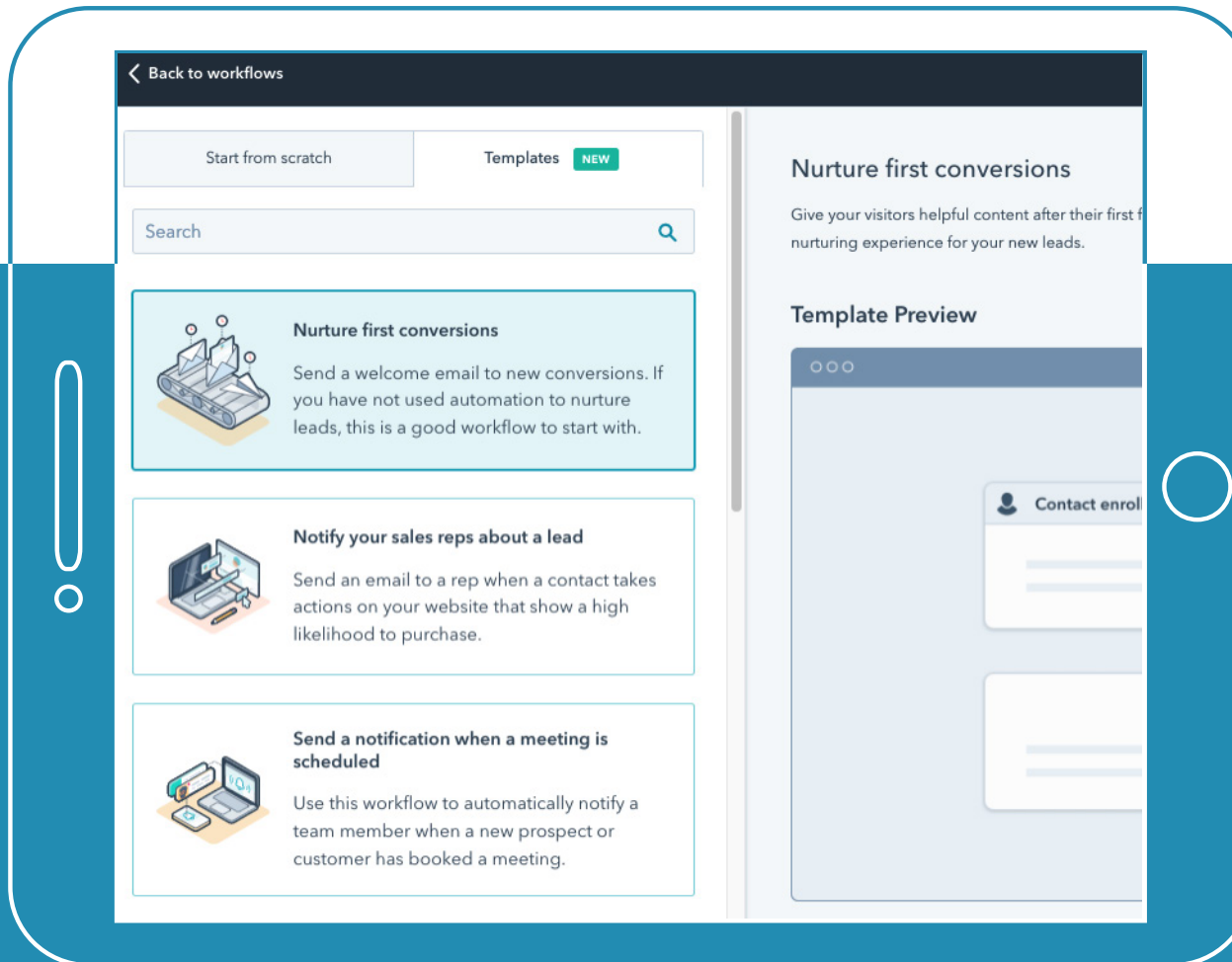
Executing ABM campaigns in HubSpot

The screenshot shows the HubSpot 'Target Accounts' page. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, Reports, Asset Marketplace, and Partners. The left sidebar has a 'Target accounts' section with filters: 'All' (selected), 'No open tasks', 'No logged calls', 'No meetings', 'No open deals', 'No decision maker', 'Blockers', 'Find target accounts', 'Recommendations', and 'Prospects'. The main content area shows two summary cards: 'TARGET ACCOUNTS' with a count of 46 and 'Total chosen companies', and 'ACCOUNTS WITH OPEN DEALS' with a count of 9 and '20% of target accounts'. Below these is a search bar labeled 'Search target accounts'. A table follows with columns for 'COMPANY', 'CONTACTS', and 'OPEN DEALS'. The table lists three companies with their respective contact and deal counts.

COMPANY	CONTACTS	OPEN DEALS
[Redacted]	3	0
[Redacted]	21	1
[Redacted]	3	0

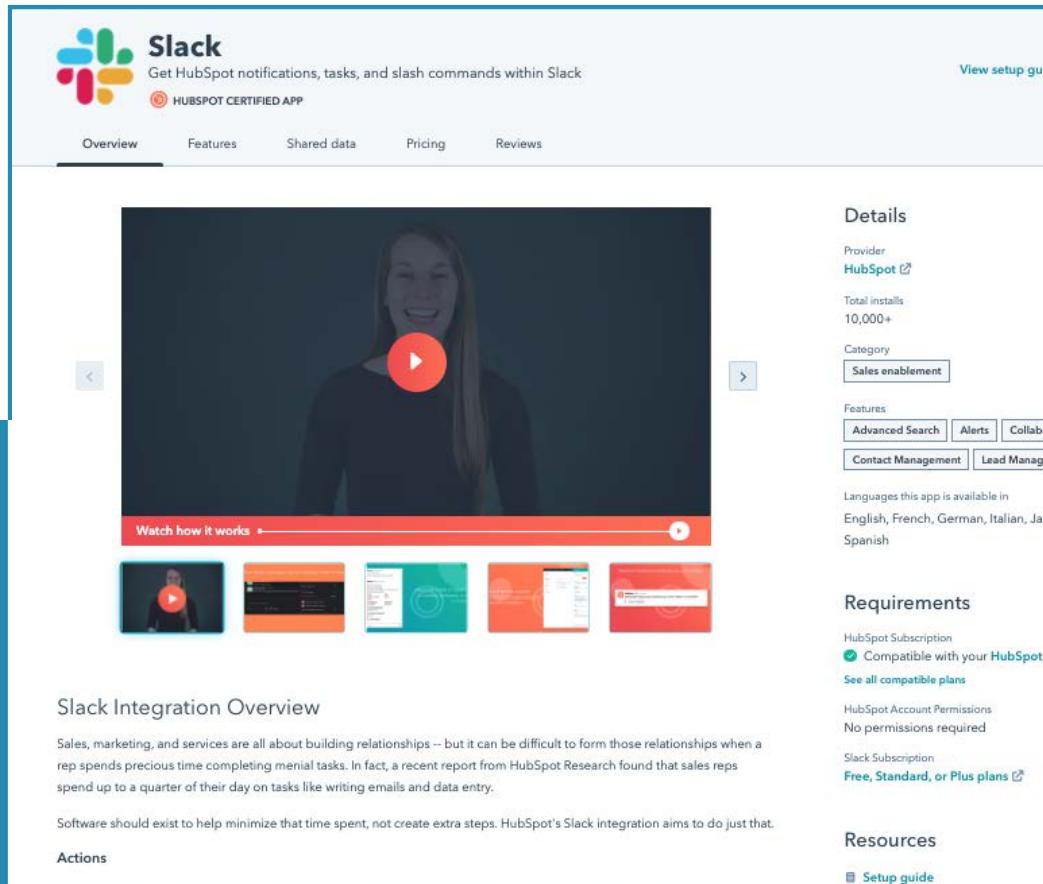
1. **Create a target account list** by adding AI-suggested target accounts, viewing prospects in the prospect tool, or importing target accounts using an integration with a third party tool like LinkedIn Sales Navigator, ZoomInfo, Bombora, Terminus, or RollWorks.
2. **Track & view account activity** in the account overview panel to view all touches and interactions across the entire buying committee in one place, ensuring both sales and marketing have a clear understanding of the state of each target account.





3. **Use workflows to label your ICP tiers and buying roles**, and use company lists to group your target accounts and buying committee to leverage with company targeting in your campaigns.
4. **Use the campaigns tool to plan and deploy all of the touches and asset iterations** for your ABM plays. Social media, ads, landing pages, forms, emails, and much more can be added to a campaign to roll up reporting & results into one view across multiple assets.
5. **Use smart content and A/B testing on your landing pages** to give a personalised experience, and leverage chatbots to ensure your prospects can find what they need.
6. **Use workflows and 3rd party integrations to continuously segment your lists** and to update an account's ad and other targeting based on engagement, intent, scoring, etc.





Slack
Get HubSpot notifications, tasks, and slash commands within Slack
HUBSPOT CERTIFIED APP

Overview Features Shared data Pricing Reviews

Details

Provider
HubSpot

Total installs
10,000+

Category
Sales enablement

Features
Advanced Search Alerts Collaboration
Contact Management Lead Management

Languages this app is available in
English, French, German, Italian, Japanese, Spanish

Requirements

HubSpot Subscription
Compatible with your HubSpot account
See all compatible plans

HubSpot Account Permissions
No permissions required

Slack Subscription
Free, Standard, or Plus plans

Resources
Setup guide

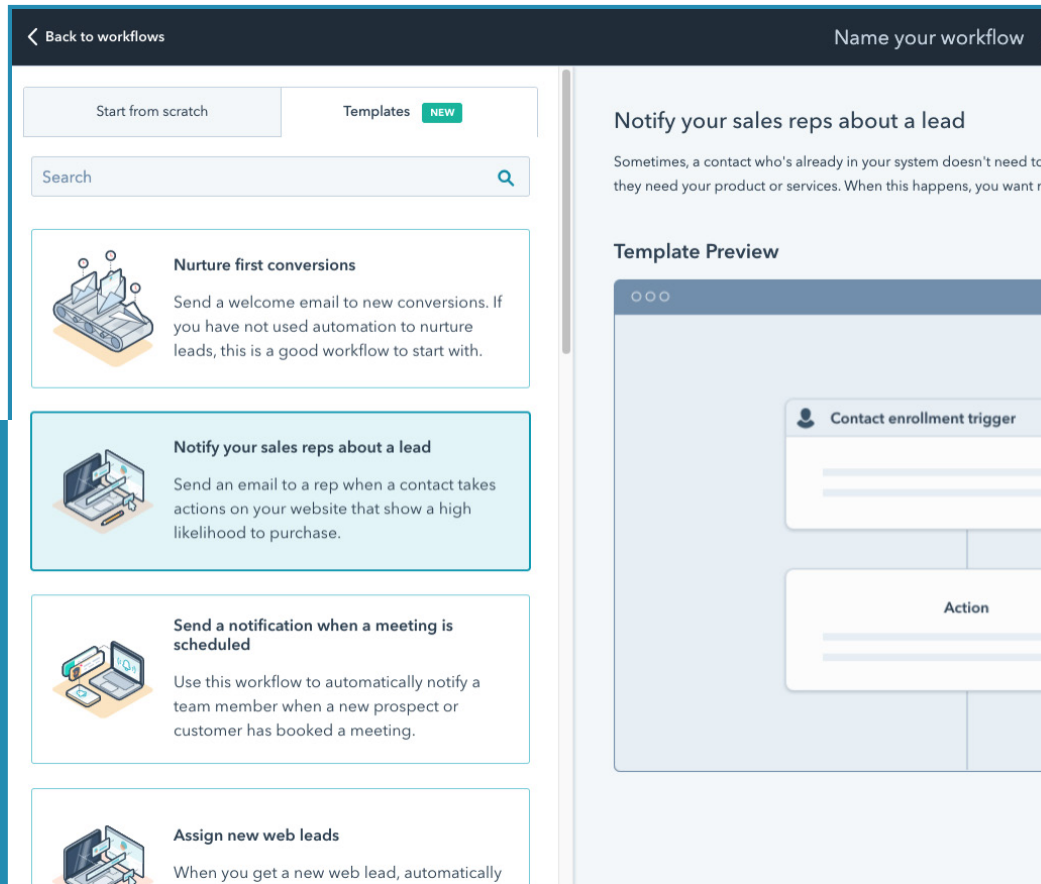
Slack Integration Overview

Sales, marketing, and services are all about building relationships -- but it can be difficult to form those relationships when a rep spends precious time completing menial tasks. In fact, a recent report from HubSpot Research found that sales reps spend up to a quarter of their day on tasks like writing emails and data entry.

Software should exist to help minimize that time spent, not create extra steps. HubSpot's Slack integration aims to do just that.

Actions

7. **Update lifecycle stage and lead status** based on behaviour or custom events and sync your lifecycle stages with external ad platforms for better AI optimisation for your ad campaigns.
8. **Use workflows and company scoring to surface accounts to sales** at the right time and keep sales in the know, moment by moment, of account activity using the Slack integration.



9. Use Operations Hub data quality features to ensure that all data syncing between tools is clean and consistent.

10. Automate the work of your sales team by leveraging workflows to assign tasks and send notifications.

11. Research active prospects and accounts with the LinkedIn Sales Navigator integration right inside of HubSpot and make your outreach timely and relevant.



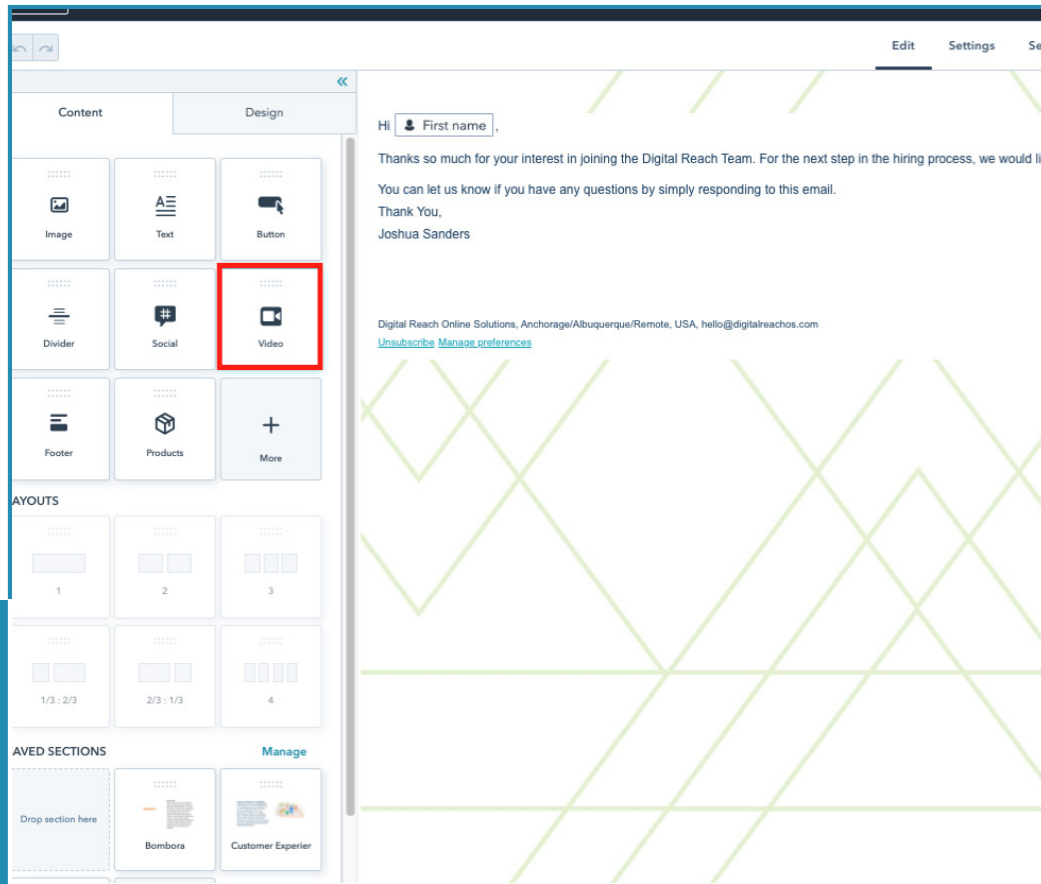
LinkedIn Sales Navigator
Access LinkedIn Sales Navigator tools within HubSpot contact records.
HUBSPOT CERTIFIED APP

Overview Features Shared data Pricing Reviews

Details
Provider: HubSpot
Total installs: 10,000+
Category: Sales enablement
Features: Contact Management
Languages this app is available in: Dutch, English, French, Spanish

LinkedIn Sales Navigator Integration Overview
Bring the Power of LinkedIn Sales Navigator to HubSpot
LinkedIn Sales Navigator is a powerful tool that helps sales teams target, understand, and engage with leads and prospects. From company news to lead search and InMail, it's a goldmine of useful features for sales reps. With the HubSpot-LinkedIn Sales Navigator integration you can unlock access to all of these tools directly from the HubSpot contact record.

12. **Enrol buying committee members into sequences** automatically based on any of over a thousand trigger options. Essentially, any information about the account can be utilised to determine the right time to enrol an account into a sequence.
13. **Suggest content for sales** to use in the buying process based on prospect's consumption history using workflows and user behaviour data to personalise the journey.



14. **Use HubSpot videos** in your sales outreach for personalisation.
15. **Use workflows and offline marketing integrations** like postal.io to automatically send gifts to your buying committee based on deal size, ICP tier, lifecycle stage, deal stage, and more.
16. **Analyse data across the entire buyer's journey** in one place with reports and dashboards, collaborate on changes with the campaign tool, and implement iterations and optimisations into your campaigns all from HubSpot.



Ever thought about combining your ABM with inbound?

Inbound and ABM go together like peas in a pod. With both based on delighting the customer and driving value first, it is no wonder that so many marketers combine these two practices for digital marketing bliss. What makes these two approaches so complementary? Think about it:

- Inbound focuses on giving the customer what they want and need at each step of the buyer's journey – it is buyer-centric.
- ABM focuses on using deep account knowledge to personalise the buyer's journey at scale, focusing on an entire account/buying committee.
- ABM requires sales and marketing alignment and allows sales to spend more time on the right leads.

When you put these two practices together, you deliver an experience that makes prospects delight in interacting with your brand.

INBOUND + ABM =

**a buyer-centric strategy where
Sales and Marketing are
on the same page**



When sales and marketing work together, things work: Marketing Hub + Sales Hub customers see **144% increase in close deals after 12 mths compared to only 58% with Sales Hub only or 51% with Marketing Hub only**

HubSpot users have seen impressive results when they combine the Marketing and Sales Hubs for sales and marketing alignment:

They also see their customers engage more, their pipelines grow faster, and their sales team spending more time focused on building revenue-growing relationships with their prospects.

ABM is a powerful practice, especially when paired with inbound marketing and deployed in a single, streamlined system that delivers a seamless customer experience. HubSpot allows you to do just that and to do so with ease and outstanding outcomes.



Wrap-up

ABM has been around for a while but it is now rapidly growing in popularity - in 2021, **70% of marketers report using ABM**, up 15% from 2020 (HubSpot). This is largely due to the rise in technology which is improving targeting and therefore increasing ABM's potential.

ABM is a great strategy to get cut-through in dominant markets, whilst also improving ROI and sales and marketing by working on shared KPIs – which is a common problem today.



Why businesses love working with Digital Litmus

We specialise in supporting B2B tech companies in the SME space. Acting as a true extension of your team, we provide the full service of best practice account-based marketing strategy through to execution and reporting to maximise your ROI.

Our approach to ABM is strategic, systemised and analytical - We only work with B2B SMEs so we understand how to disrupt the complex buyer journey and develop activities and comms that are designed to identify prospects that have intent in the market.

Commercially focused - We analyse the results to optimise promotional activity and identify further opportunities into the future.

Driven by CMO level strategists - That work closely with you to develop the criteria for prioritisation / segmentation - and then dig into the customer needs and pain points of the set of

accounts in the mix for the ABM campaign. This ensures all campaign messaging and content across the sales funnel is on point and resonates with the target prospects - also equipping sales teams with what they need to convert.

Best practice execution - We then apply our marketing operations experience (as a HubSpot Platinum Partner) to ensure a seamless experience with marketing technology, minimising any manual effort through activities such as lead nurture and ensuring consolidated end-to-end reporting is in place.

At Digital Litmus, we offer a free assessment to help establish whether you need inbound marketing or ABM marketing...or both.

To book your free assessment, get in touch today

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