

BrandExtract°

ABM

Account Based Marketing Overview
Your webinar will start shortly!



Introductions

Jonathan Fisher, Chairman

- 20+ years of strategic, branding and marketing work with firms such as Chevron, Fulbright & Jaworski, Zachry, EFI Global and many others.
- Advises and works with SMBs via his work with The Entrepreneur's Institute
- Sits on the board at the Houston ToolBank and the Houston Philanthropic Society

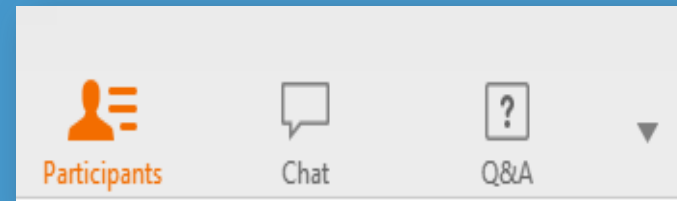
Mark McCary, SVP Sales Programs

- 20 years sales and marketing leadership (3M and S&P Global)
- Implemented 20+ ABM programs resulting in 10%-200% increases for clients/former companies
- Certified ABM Marketer-Sirius Decisions
- Certified SPIN™ Solution Sales Trainer
- Certified Sales Management-Huthwaite

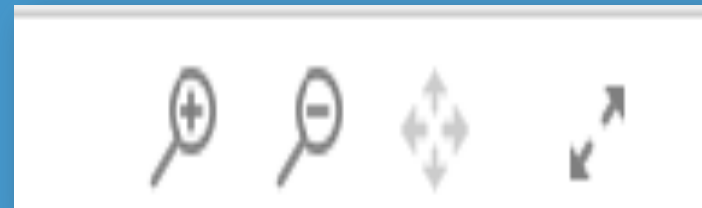


Housekeeping

1. Utilize the Q&A panel during the presentation to post questions to the presenter.



1. For best viewing, expand your window by using the icons at the top of the presentation



Agenda

- What/Why/When ABM
- Types of ABM
- The ABM Process
- Examples
- How do I get started

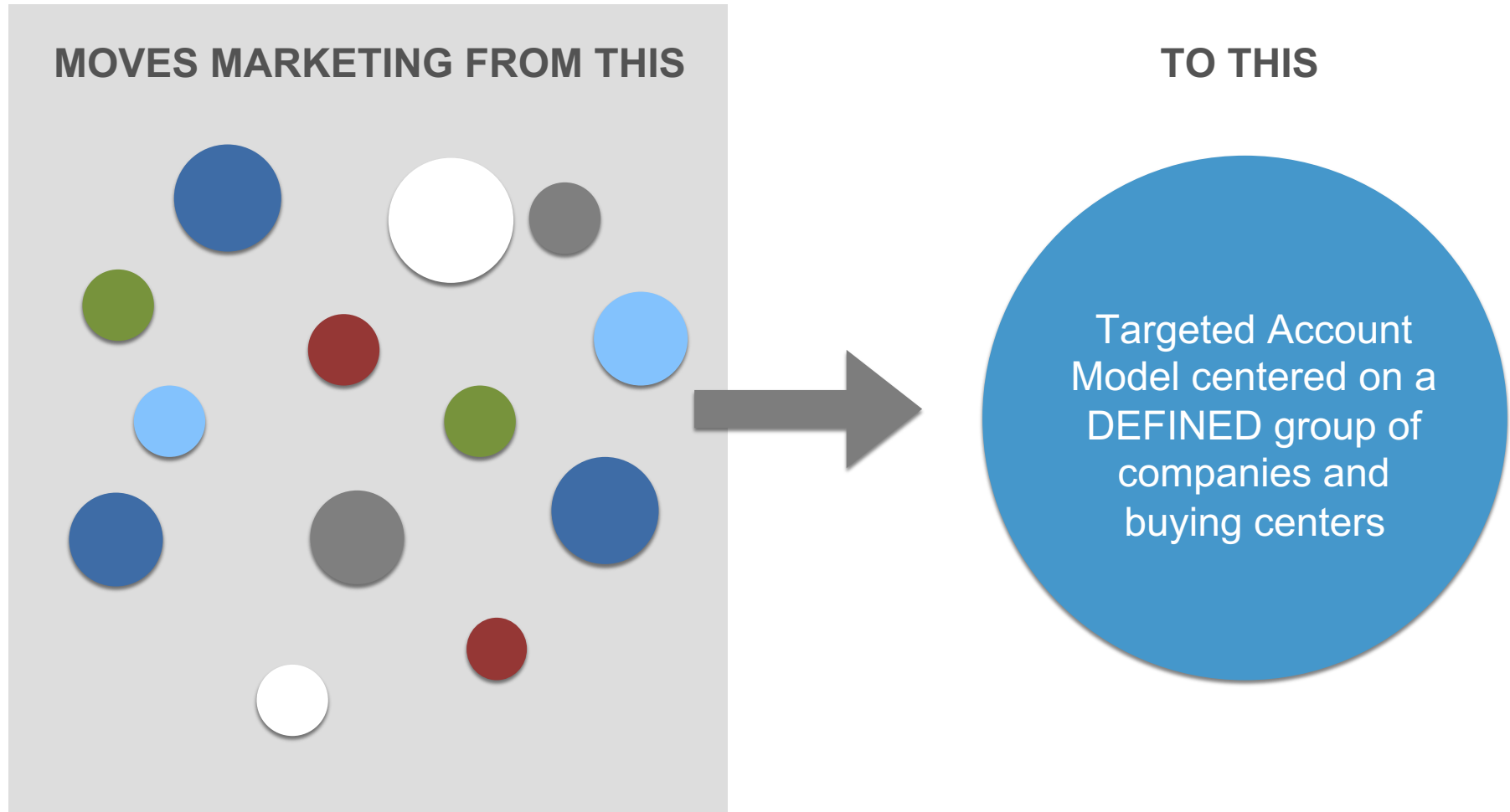


What is Account Based Marketing

ABM is a strategic approach that focuses resources on a specific group of qualified target accounts. When ABM is implemented correctly, it's more effective than broad-based marketing because it targets high-potential accounts, is more prescriptive for both marketing and sales, and is goal-oriented which tends to produce the desired results.



Why ABM- Purpose of Account Based Marketing



Broad Based Demand Generation – scatter effect

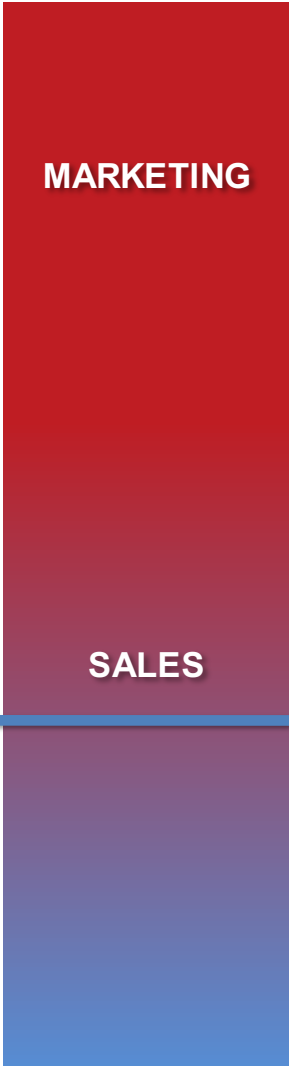


Why Now? New Marketing & Sales/Buying Funnel

THEN



NOW



Why is B2B moving toward an ABM approach?

According to a 2016 study of B2B Marketers 49% are running ABM programs, and 71% are planning on doing more ABM in the next 6 months.

-Infer Group....Why?

- **97%** achieved “somewhat higher” or “much higher” ROI with account based marketing than other marketing initiatives - *Alterra Group*
- **84%** found account based marketing “provided significant benefits to retaining and expanding existing client relationships” (36% characterized the impact as “major”) - *Alterra Group*
- **65%** achieved significant benefits to attracting new clients (19% characterized the impact as “major”) - *Alterra Group*
- Over two-thirds of the study participants report that ABM is favorably impacting their revenue. - *Demand Metric*
- For those using ABM, over 80 percent state that it is one of the most important revenue generating strategies in use. - *Demand Metric*



When ABM? When a lot of opportunity and/or risk exists...

Use Cases for ABM

Large universe of potential customers but limited sales and marketing resources

Highly competitive situation

Long, complex sales cycle

New industry focus

New product launch (significant upside)

Targeting just a few large, complex accounts with multiple buying centers

Launching a new concept type of product or service

Old go-to-market process just isn't working as well as it used to...



The ABM Process

The ABM Process

ABM Inputs



1. Strategic Goals

Grow xyz segment by 10%, increase retention by 5%, improve customer satisfaction, etc.-Pick 1

2. Data Audit

Revenue by customer/product, CRM data, public data, association data, augment data with SIC codes, revenues, # of employees, etc.

3. Segmentation and Statistical Analysis

Firmographic segments, needs segmentation, tiers, analysis and implications

4. Goal & Metrics

Specific and measurable goals for the strategic goal you fo

Select ABM Type of Programs

LAM

NAM

CLM

ISM

The Four Strategic Types of ABM Programs

Account Based Marketing Models

Large Account Marketing (LAM)

Sales and marketing plan for each large account where there is significant risk/reward.

Goals:

- New Business
- Cross-Sell/Upsell/Retention
- Loyalty and Advocacy

Named Account Marketing (NAM)

Moderate or larger number of defined existing or new accounts, often based on sales territory

Goals:

- New Business
- Cross-Sell/Upsell/Retention

Customer Lifecycle Marketing (CLM)

Moderate or larger number of existing accounts that receive differentiated outreach based on lifecycle of the accounts.

Goals:

- Cross-Sell/Upsell/Retention
- Advocacy Development

Industry/Segment Marketing (ISM)

Any number of new or existing accounts in the same vertical or other specific segment

Goals:

- New Business
- Cross-Sell/Upsell/Retention



Stages of ABM



ABM Stage Gate Checklist

Platts ABM New Product/Upsell/Cross-sell Checklist											
STAGE/TASK	Senior Management (Sales & Marketing)	Product Managers	Marketing Lead	Commercial Manager (Sales)	Client Development Manager (CDM)	Client Services Lead	Sales Analyst	Info Management (Marketing Analyst)	Comments	Forum (Suggested)	References/Tools
Pre-Planning											
Establish goal for program	R		R	R					Use SMART		Need detailed guidelines for setting goals
Identify Program team members and confirm resource availability	I	I	R	R	I	I	I	I	Should include cross-functional group; Sales, Product Management, PMM		
Communicate/Confirm team Roles and Responsibilities	I	I	R	R	I	I	I	I	<u>Team lead</u> to prepare brief with all pre-planning materials/actions		"Brief" form/template?
Establish criteria to identify accounts			R	R			S				
Gather necessary data to analyze accounts			R	R	R		S	S			
Identify any data gaps			R	R	R		S	S			
Schedule Planning (Kick-off) Meeting	I	I	R	R	I	I	I	I	Face-to-Face preferred, where feasible		
Planning (Kick-Off) Meeting										In-Person, where practical	
Review and validate selected accounts			R	R	R		S	S	determine achievability and opportunity		
Finalize list of accounts to meet program goals			R	R	R		S	S			
Identify key activities needed to achieve goal(s)	I	C	C	R	C	I	C	C	These are activities/KPI's that support goal(s); e.g. # of customer meetings/demo's, trials/conversion rates...these drive tactics		
Marketing-Led Tactics			R								
Sales Enablement Tactics				R							
Editorial/Analyst Tactics		R									
Define Next Steps / Key Deliverable Dates, Ownership	I	C	R	R			S	S	Include development of final program, additional data requirements/research measure/metrics for key tactics		CAD?
Program Development & Implementation											
Define data needs from gap analysis	A	R	R	R	C	I	S	S	What do we need to know to execute		
Backfill key information for holistic view of combined account intelligence	I	I	I	I	I	I	R	R	Review comprehensive data set		
Present combined data and confirm goals and metrics			R	R							
Finalize overall program for implementation			R	R							
Create timeline and milestones for dashboard			R	R					Include measurement stages		
Create communication plan for key stakeholders			R	R					Include dashboard and metrics		
Go / No Go Decision	I		R	R							
Program Execution & Analysis											
Launch program	I	C	R	R	S		S	S	Includes all tactics to agreed timeline		
Track results based on agreed metrics and frequency							R	R			
Follow communication plan to key stakeholders									Status updates as appropriate		Do we need a standard report form?

RASCI abbreviation definition for the purposes of this process
R = Responsible - owns task/problem/decision
A = For whom R is accountable to - who must sign off (**approve**) on work before it is effective
S = Support - provide resource, play a supporting role or carry out tasks in implementation



RASCI abbreviation definition for th
R = Responsible - owns task/problem
A = For whom R is accountable to -
 is effective
S = Support - provide resource, play
 implementation

STAGE/TASK

Senior Management
(Sales & Marketing)
 Product Managers
 Marketing Lead
 Commercial Manager
(Sales)
 Client Development Manager
(CDM)
 Client Services Lead
 Sales Analyst
 Info Management
(Marketing Analyst)

Comments

Pre-Planning

Establish goal for program

R

R

R

Use SMART

Identify Program team members and confirm resource availability

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Should include cross-functional group Management, PMM

Communicate/Confirm team Roles and Responsibilities

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Team lead to prepare brief with all program materials/actions

Establish criteria to identify accounts

S

Gather necessary data to analyze accounts

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Identify any data gaps

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Schedule Planning (Kick-off) Meeting

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Face-to-Face preferred, where feasible

Planning (Kick-Off) Meeting

Review and validate selected accounts

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determine achievability and opportunities

Finalize list of accounts to meet program goals

R

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S

Identify key activities needed to achieve goal(s)

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These are activities/KPI's that support meetings/demo's, trials/conversion rate

Marketing-Led Tactics

R

Sales Enablement Tactics

R

Editorial/Analyst Tactics

R

Define Next Steps / Key Deliverable Dates, Ownership

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Include development of final program requirements/research measure/metrics

Program Development & Implementation

Define data needs from gap analysis

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What do we need to know to execute

Backfill key information for hollistic view of combined account intelligence

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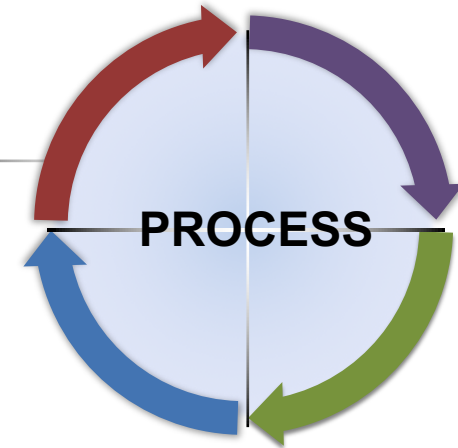
Review comprehensive data set

Target Account ID & Segmentation

Target Account ID and Segmentation

Process

- Determine and analyze data sources (Sales data, Client Research, CRM Data, etc.)
- Needs-based segmentation
- Incorporate SIC/NAICS (Industry, Size, Revenues, etc.) segmentation
- Benchmark if possible
- Develop a segmentation and prioritization model
- Gather data for customer life-time value



Deliverables

- Target account prioritization model (Potential growth and Customer Life Time Values)
- Dynamic, targeted list of high potential accounts updated quarterly
- Segmented customer and prospect database of accounts
- Identified buying center and contacts
- Plan to grow buying center contacts



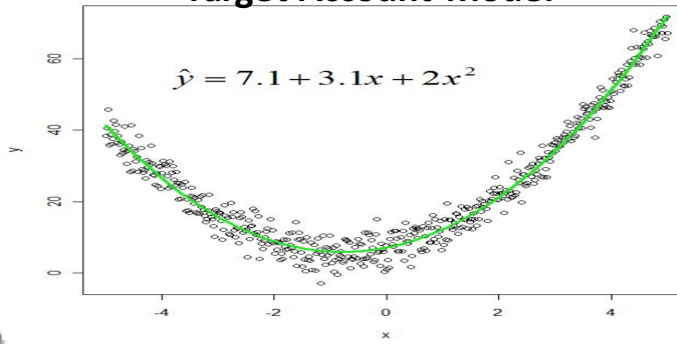
Data Quality and Gap Analysis

WHAT CAN YOU REPORT ON:		WHERE IS DATA SOURCED?	DATA QUALITY
Usage & Response	<input type="checkbox"/> Customer Participation		
	<input type="checkbox"/> Customer Inquiries		
Sales Endorsement	<input type="checkbox"/> Usage		
	<input type="checkbox"/> Rating/Satisfaction		
Conversion	<input type="checkbox"/> Satisfaction/Loyalty		
	<input type="checkbox"/> Marketing Qualified Leads		
	<input type="checkbox"/> Sales Qualified Leads		
	<input type="checkbox"/> Marketing Sourced Pipeline		
Results/Impact	<input type="checkbox"/> Individual contact names		
	<input type="checkbox"/> Sales Cycle Length		
	<input type="checkbox"/> Sales Phase Duration		
	<input type="checkbox"/> Revenue		
	<input type="checkbox"/> Individual Rep Results		
	<input type="checkbox"/> Retention		
	<input type="checkbox"/> Reference Accounts		
Overall	<input type="checkbox"/> Inquiries		
	<input type="checkbox"/> SQL's		
	<input type="checkbox"/> SALs		
	<input type="checkbox"/> Lead Waste		
	<input type="checkbox"/> Customer satisfaction		
	<input type="checkbox"/> References		
	<input type="checkbox"/> Materials created (volume)		
	<input type="checkbox"/> Sales utilization (volume)		
	<input type="checkbox"/> Press/blog mentions/significance		
	<input type="checkbox"/> Referrals (# of)		

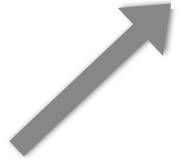
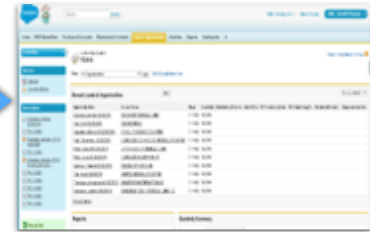


Target Account Modeling

Target Account Model



CRM Data



Product Revenue Data

Row Labels	Sum of Net Annualized	Gas Daily	Gas Market Report	Market Data - G	Regional Obsvse	Grand Total
ABC Co	\$ 51,474.00	\$ 8,822.00	\$ 196,245.00	\$ 25,601.86	\$ 282,142.86	
CDP Co	\$ 52,520.80	\$ 2,005.00	\$ 116,117.00	\$ 70,094.14	\$ 240,736.94	
WTC Inc	\$ 167,887.00	\$ 167,887.00	\$ 0.00	\$ 0.00	\$ 335,774.00	
Energy R US	\$ 16,407.00	\$ 3,750.00	\$ 119,889.00	\$ 88,710.00	\$ 228,756.00	
DEC	\$ 27,568.00	\$ 18,354.00	\$ 181,877.87	\$ 227,199.87	\$ 546,839.74	
Big Company	\$ 23,963.00	\$ 6,156.00	\$ 106,650.00	\$ 190,789.00	\$ 327,558.00	
Example Co	\$ 53,881.70	\$ 4,226.00	\$ 59,530.44	\$ 73,995.81	\$ 171,633.95	
RevCo	\$ 11,096.00	\$ 2,005.00	\$ 149,530.00	\$ 162,621.00	\$ 325,252.00	
CD Co	\$ 15,327.50	\$ 17,016.38	\$ 47,598.50	\$ 27,507.00	\$ 107,449.38	
Gas Co	\$ 31,434.00	\$ 21,957.20	\$ 80,990.00	\$ 137,881.20	\$ 252,262.40	
Coal Co	\$ 14,870.00	\$ 15,358.00	\$ 44,302.00	\$ 52,065.00	\$ 126,595.00	
LNG Co	\$ 20,287.50	\$ 5,211.00	\$ 77,863.75	\$ 21,195.00	\$ 104,557.25	
Land P Co	\$ 21,035.67	\$ 5,003.14	\$ 92,702.40	\$ 118,740.21	\$ 237,481.41	
Mid Stream Co	\$ 51,684.00	\$ 0.00	\$ 65,415.00	\$ 117,099.00	\$ 234,198.00	
Down Stream LLC	\$ 45,114.00	\$ 8,421.00	\$ 0.00	\$ 60,749.76	\$ 114,284.76	
Upstream Inc	\$ 9,903.00	\$ 8,609.00	\$ 98,213.43	\$ 111,750.45	\$ 218,575.88	
ABC Resources	\$ 18,125.00	\$ 2,000.00	\$ 84,405.00	\$ 104,530.00	\$ 209,060.00	
ABC Midstream	\$ 24,489.44	\$ 0.00	\$ 60,742.50	\$ 15,400.00	\$ 100,631.94	

Custom Data



Needs Analysis:

- Event driven factors
- Need-driven factors
- Competitive factors

FIRMOGRAPHIC SEGMENTATION



Target Account Model Outputs

name	address1	city	state	zip	factype	CScore	Fit.Tech	Fit.Price	Rank	Percentile
JACKSON MEMORIAL HOSPITAL	1611 NW 12TH AVE	MIAMI	FL	33136	HOSPITAL	95.5	4.9	4.9	1	99.9
MEMORIAL REGIONAL HOSPITAL RADIOLOG	3501 JOHNSON ST	HOLLYWOOD	FL	33021	HOSPITAL	90.2	4.95	4.95	2	99.9
BAPTIST HOSPITAL OF MIAMI	8900 N KENDALL DR	MIAMI	FL	33176	HOSPITAL	88.5	4.91	4.91	3	99.8
UNIVERSITY OF MIAMI HOSPITAL	1400 NW 12TH AVE	MIAMI	FL	331361003	HOSPITAL	87.7	5	5	4	99.8
JFK MEDICAL CENTER	5301 S CONGRESS A	LAKE WORTH	FL	33462	HOSPITAL	85.6	4.85	4.85	5	99.7
MOUNT SINAI MEDICAL CENTER	4306 ALTON RD	MIAMI BEACH	FL	33140	HOSPITAL	81.3	4.91	4.91	6	99.7
ST MARYS MEDICAL CENTER	901 45TH ST	WEST PALM BEACH	FL	33407	HOSPITAL	79.3	5	5	7	99.6
BROWARD HEALTH MEDICAL CENTER	1600 S ANDREWS A	FORT LAUDERDALE	FL	33316	HOSPITAL	78.9	5	5	8	99.6
BOCA RATON REGIONAL HOSPITAL	800 MEADOWS RD	BOCA RATON	FL	33486	HOSPITAL	78.1	4.87	4.87	9	99.5
GULF COAST MEDICAL CENTER	13681 DOCTORS W	FORT MYERS	FL	33912	HOSPITAL	77.8	5	5	10	99.5
CLEVELAND CLINIC FLORIDA HEALTH SYS	3100 WESTON RD	WESTON	FL	33331	HOSPITAL	76.9	4.84	4.84	11	99.4
SOUTH MIAMI HOSPITAL IMAG. SVCS.	6200 SW 73RD ST	MIAMI	FL	33143	HOSPITAL	76	4.88	4.88	12	99.3
MERCY HOSPITAL A CAMPUS OF PGH RA	3663 S MIAMI AVE	MIAMI	FL	33133	HOSPITAL	71.7	4.84	4.84	13	99.3
WESTSIDE REGIONAL MEDICAL CTR RADIO	8201 W BROWARD	PLANTATION	FL	33324	HOSPITAL	71.4	5	5	14	99.2
NCH DOWNTOWN NAPLES HOSPITAL RADIO	350 7TH ST N	NAPLES	FL	34102	HOSPITAL	70.5	4.89	4.89	15	99.2
HEALTHPARK MEDICAL CENTER	9981 S HEALTHPARK	FORT MYERS	FL	33908	DIAGNOSTIC IMAGING	70.5	5	5	16	99.1
PALMETTO GENERAL HOSPITAL RADIOLOG	2001 W 68TH ST	HIALEAH	FL	33016	HOSPITAL	70.4	5	5	17	99.1
BETHESDA HEALTH	2800 S SEACREST BL	BOYNTON BEACH	FL	33435	HOSPITAL	69.6	5	5	18	99



Segmentation Output Example

2015

	Upsell				Prospect-Cross				Prospect-New Logo		
	Entities (#)	Avg Net Growth/Account	1st Yr. Net Sales Growth (Conservative)	1st Yr. Net Sales Growth (High)	Entities (#)	Avg Net Growth/Account	1st Yr. Net Sales Growth (Conservative)	1st Yr. Net Sales Growth (High)	Entities (#)	Avg Net Growth/Account	1st Yr. Net Sales Growth (Conservative)
ATMs	200	\$ 50,000	\$ 10,000,000	\$ 12,000,000	300	\$ 43,333	\$ 13,000,000	\$ 15,600,000	159	\$ 50,000	\$ 7,950,000
SnapCheck	10	\$ 9,846	\$ 98,462	\$ 117,213	250	\$ 9,846	\$ 2,461,559	\$ 2,953,871	200	\$ 12,000	\$ 2,400,000
Nectar	20	\$ 25,000	\$ 500,000	\$ 800,000	150	\$ 25,000	\$ 3,750,000	\$ 4,500,000	80	\$ 18,750	\$ 1,500,000
ATM Fac Mgmt	93	\$ 16,129	\$ 1,500,000	\$ 2,000,000	300	\$ 6,500	\$ 1,950,000	\$ 850,000	100	\$ 8,000	\$ 800,000
Processing and Managem	200	\$ 10,000	\$ 2,000,000	\$ 3,000,000	400	\$ 6,500	\$ 2,600,000	\$ 58,119	200	\$ 6,000	\$ 1,200,000
TOTAL ALL	523	\$ 110,975	\$ 14,098,462	\$ 17,917,213	1,400	\$ 91,180	\$ 23,761,559	\$ 23,961,991	739	\$ 94,750	\$ 13,850,000



Customer Touch Scorecard – ongoing updates to model

Qualification Scoresheet		Prospects	Prospects	Prospects	Prospects	Prospects
Qualification Criteria	Legend (1/2 for yes, 0 for no)	Acct Name	Acct Name	Acct Name	Acct Name	Acct Name
Money - Have they budgeted for your product? When are the dollars available to spend (ie: "when does your budget year start")		2	1	2		2
Authority - Does your contact have authority? If not, do you have agreement to meet with Decision Makers?		0	2	2		2
Need - Have you identified a clear need? Why do they absolutely need your product or service??		1	1	2		1
Impending Event - renewal etc)						
Applications - Have client strongly desired?						
Competition - Do you have a full understanding of their decision time frame? (bids due here, demos here, decision here, etc)		1	1	1		1
Demo - Has your contact agreed to a demo?		0	0	0		0
Needs Assessment - Has your contact agreed to a Needs Assessment?		2	1	0		1
		7	8	12	0	9

Below a 7? Need to go back and get some yes's.

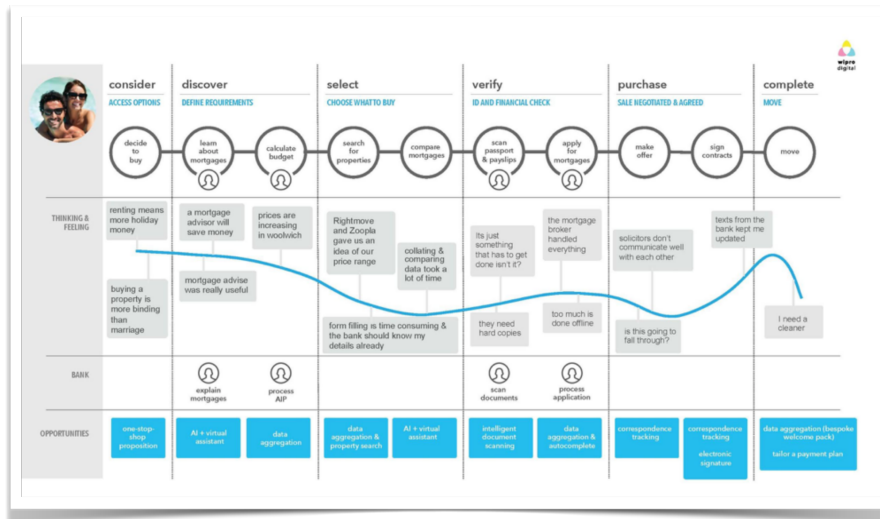
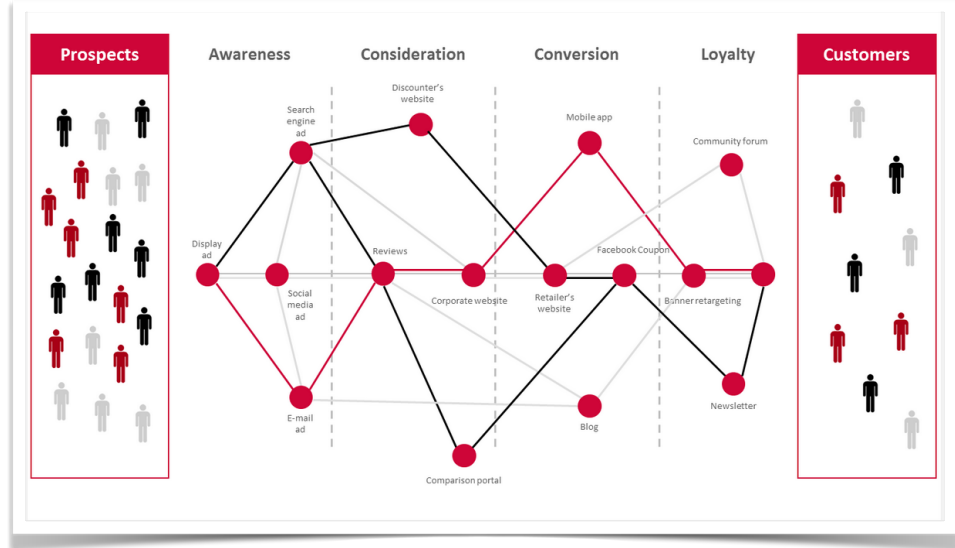
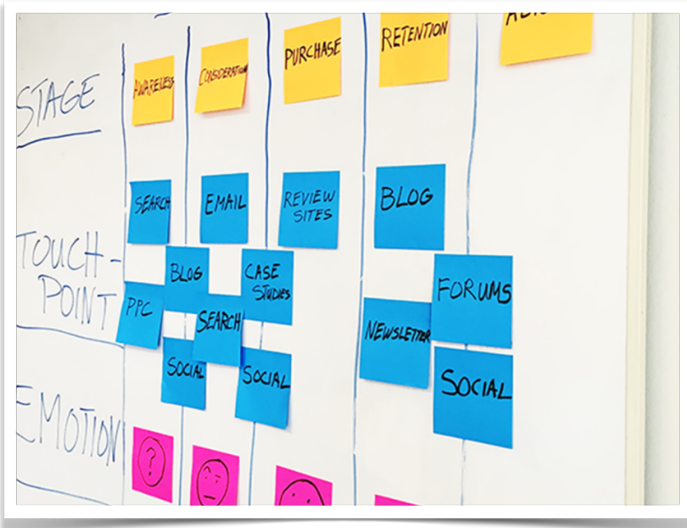
10+ Get after it!

13 - win coming your way, just watch the competition!



Customer Journey Mapping

Customer Journey Mapping



ABM Program Planning

	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
2F ABM Program												
2F target account and contact identification	Research, Build Model	Deliver TA List										
2F program goals, schedule and timing		Strategy	Strategy							reviews		
Customer journey mapping and buying center profiles			Mapping									
Customer journey gap analysis			Analysis									
Market sizing and segmentation			Refine	Refine								
3-5 Sales enablement tools (white paper, case studies, comparison guides, technical specification docs.)				development	development	development						
Pardot Email Education/Demand Generation Program				strategy	development	campaign launch	nurture	campaign #2		campaign #3		
Branding/Reputation Program to book meetings				creative	development		tours		tours		tours	
Measurement program design			set up									
2F Sales playbook in Salesforce			set up									
Event marketing campaign/templates (pre, during and post)									Strategy	creative	development	deve



MARKETING AND SALES VEHICLE PLANNING

- How much of the journey is web based?
- How much is/can be event-based?
- How much is/can be from sales/customer service, etc.?
- Is your target audience engaging on certain social media sites?

CONTENT GAP ANALYSIS

- Landing page content
- SEO analysis and content
 - Keywords
 - Page updates
 - PDF to web
- PPC content
- Social media content

SALES ENABLEMENT GAP ANALYSIS

- Case studies
- Technical data sheets
- References
- Capabilities brochure
- White paper
- Research briefs
- Use case briefs
- Etc.
- Email content for demand generation/nurture/retention programs

ABM Program Strategy

Campaign Theme: We help you grow your business

	UP-SELL PRODUCT A TO SEGMENT B	PROSPECTS-PRODUCT A TO SEGMENT C	RETENTION SEGMENT D PRODUCT ISSUE
Brand	<p>Example: Education Seminar</p>	<p>Example: Influencer Campaign</p>	<p>Example: Social Media Outreach</p>
Demand Creation	<p>Example: Email Nurturing Local Events</p>	<p>Example: PPC, Targeted Email Nurturing Webcast</p>	<p>Example: Direct Mailing Email Updates</p>
Sales Enablement	<p>Example: Playbook Customer Refs</p>	<p>Example: Playbook Testimonials/Case Studies</p>	<p>Example: Playbook Discount Offer</p>

This is a sample chart*

Named Account Marketing Example

NAM

The Goal: Successfully penetrate 200 Tier 2 named accounts to increase new software app sales 20% year over year.

Company: *Mid-sized SaaS company targeting the energy industry*

How: Target Traders, Schedulers and Operations at Existing Accounts

1. Utilize needs-based email (from sales rep), driving targets to the microsite, to self educate and qualify
2. Marketing to monitor responses and generate call list for sales
3. Sales to utilize a playbook approach and-follow up with a call, demo and close
4. Not ready– move to a nurture/educate program

Prep work for above:

- ABM Workshop
- Fill sales enablement gaps (Produce use-case focused webinars)
- Build a sales playbook
- Build sales/client support training and accreditation
- Contact gap analysis and fill contact gaps
- Design Tier 2 marketing automation program
- Set up CRM/Marketing reports

Results:

- **Within 3 months went from 3 to 40 new opportunities which was 10% over the annual goal**
- **A year later, client exceeded our growth target by 30%**



Large Account Marketing Example

LAM

The Goal: Create more awareness and better utilization of ABC Co's XYZ product at Exxon in order to retain current bank of business (\$XX MM renewal)

Company: *Information Services Provider to the energy industry*

How: Target global heads of trading/SVP/Compliance to:

1. Introduce them to their AM to discuss ABC Cos KPIs for Exxon
2. Arrange an SME with Editorial and or the oil Knowledge Expert
3. Provide the contact with post-engagement tools that will enable them to start sharing the value of our data to the broader internal teams

High level steps to getting there:

- Contact analysis
- Contact review with contact relationship map
- Identify medium/long-term technical and/or procedural changes needed
- Identify tools/support needed by sales team to help secure Client Engagement Meeting
- Client engagement pre-meeting planning process

Results:

- **Renewal goal met**
- **Goals 2-3 resulted in \$2 million upsell/cross-sell**



Customer Lifecycle Marketing Example

CLM

The Goal: Increase upsell/cross sell rate across Tier 3 customers.

Company: Medical Device Company.

How: Create a growth ABM program for tier 3 customers

1. Analysis offer to tier Y1 customers -MAP program
2. Analysis offer to M1 customers program
3. Service playbook for service techs for M1 Y1
4. Nurture program M1 Y1

High level steps to getting there:

- Create customer lifecycle segmentation model
- Identify and segment where customers are in the customer lifecycle
- Create the communication and service plan to increase engagement.
- Create 3 targeted demand generation programs
- Create playbooks

Results:

- **Increased retention by 5%**
- **Increased upsells by 15%**
- **Increased cross sell by 20%**



Industry Segment Marketing Example

ISM

The Goal: Increase upsell/cross sell rate across Tier 1 and 2 xyz segment customers.

Company: *Information Services Provider to the energy industry.*

How: Create a growth ABM program for tier 1 and 2 customers

1. Upsell sales playbook program for Tier 1
2. Upsell sales playbook program for Tier 2
3. Cross-sell marketing and sales program for Tier 1
4. Cross-sell marketing and sales program for Tier 2
5. Channel Partner program and incentive
6. Cross –sell branding program

High level steps to getting there:

- Benchmark ideal Tier 1-2 customers
- Product/Service gap analysis
- Final list of prioritized upsell/cross-sell accounts
- Best practice sales interviews
- Marketing analysis
- Contact gap analysis versus buying centers
- Marketing automation program creation
- Create sales enablement tools

Results:

- **Increased Upsells by 20%**
- **Increased Cross-Sells by 300%**
- **Overall, added \$1.2 mm in revenue to tiers 1 and 2**



ABM 1-3 Day Workshop

ABM 1-3 Day Workshop

SCOPE

- Pre-meeting
 - Identify initial data analysis (survey, CRM, financial, etc.)
- Meeting
 - Grow Strategy
 - Goals
 - Sales Analysis
 - Needs Segmentation
 - Buying Center
 - Journey Mapping

DELIVERABLE

- ABM Strategy Mix
- Program Approach
- Timing/Gantt schedule
- Customer Journey Map
- Buying Center Profile

REPRESENTATIVES ATTENDING

- Sales
- Marketing
- Product Management
- C-Suite



Recap

- What/Why/When ABM
- Types of ABM
- The ABM Process
- Examples
- How do I get started



BrandExtract ABM Promotion....

**BOOKING ABM WORKSHOPS WITHIN
THE NEXT 60 DAYS GETS YOU FREE
SALES COACHING FOR ONE MONTH (4
SESSIONS)!**



Questions



BrandExtract^o

BrandExtract, inspiring people to create, transform and grow their brands – and bottom line. *We make believers!*

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