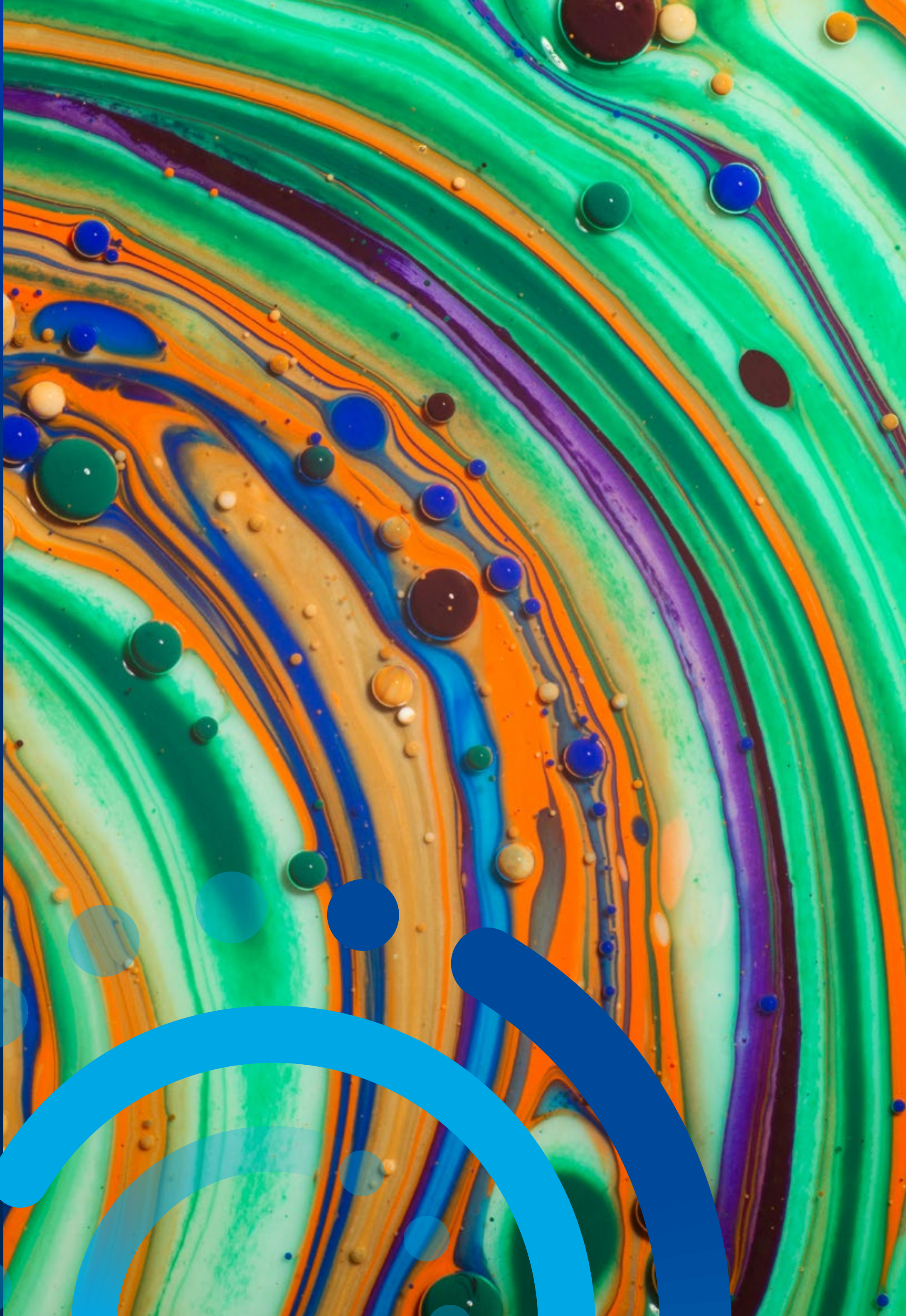
E-book

The Buying Team is Missing in Your ABM Strategy



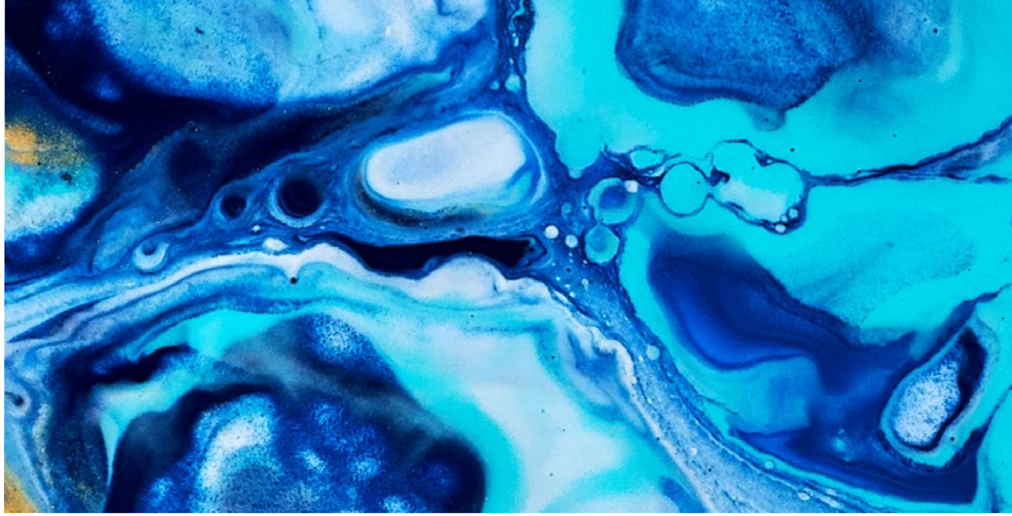
informa techtarget | in collaboration with **Josh Hill**

A note from Informa TechTarget

If you are like some demand generation leaders out there, you may have been hearing rumblings about the buying team concept for years, especially from the likes of Forrester and other firms who tout that "MQLs are dead" and B2B marketing teams need to catch up ASAP. For others, especially those deeply entrenched in a leads-based organization, building buying teams may sound unfamiliar and vague, causing a lot of uncertainty on how to make systemic changes to long-standing go-to-market strategies and workflows.

Regardless of where you are at in your journey, it's become clear that a new wave of demand gen evolution is upon us. With new technologies and tools entering the market each day, and more pressure to align to Sales and prove pipeline impact, many marketers are taking a closer look at what's missing or failing in their current approach.

That's why we wanted to turn to an expert, **Josh Hill**, to dissect the concept of buying teams in great detail as it relates to account-based marketing (ABM). If you're familiar with Josh's work, you'll know he's steeped in technical skills and marketing operations knowledge, and has strongly held beliefs on how marketing teams should strategically and technically organize themselves around buying teams.



In the e-book that follows, you'll notice that Josh uses the example of an SMB/Mid-Market company looking to move upmarket to the Enterprise to shape his narrative and guidance around ABM and buying teams. Having a tangible example to refer back to in the text and figures serves as a helpful allegory for showing how marketing and sales leaders can best align around buying teams. However, it's worth noting that the common buying team pitfalls that Josh highlights and his recommendations for building the buying team are applicable to technology firms of all shapes and sizes.

We've also included a table of contents, as well as Editor's Notes to help you navigate this comprehensive guide easily. For more information on Informa TechTarget and to catch Josh's next e-book on the "Sins of ABM," be sure to check out the **Informa TechTarget resource library** on GTM strategy, demand generation, sales, intent data and more.

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Introduction – Three mistakes of ABM

Account-based marketing (ABM) is the mantra of every technology firm ready to expand from its SMB-focused roots to the Enterprise. In this "upmarket" path, the company hopes to realize long-term contracts with more stable customers and cash flow. In such scenarios, the company's product and sales teams have often learned a lot from SMB and mid-market firms who are less risk averse and quite willing to be early adopters of new technologies.

The first sign of trouble comes when the company says, "Let's go upmarket!" without considering the many implications. Though Marketing and MOPS teams will scramble to do ABM. The result is almost always some growth – but growth that's below the potential.

I've found that there are three big mistakes fledgling Enterprise ABM teams make, all related to the **buying team**:

- No one builds the buying team.
- ABM is lead generation for Enterprises.
- ABM is a series of one-off campaigns.

Marketing and Sales teams must remember the essential truth of ABM:

ABM is about building the buying team with and for salespeople to develop relationships with the buying team to deliver a solution to a challenge.

So how do you avoid these common mistakes and hit your goals for ABM? Let's start by taking a closer look at the three common mistakes of ABM.

Mistake #1: The buying team is everyone's responsibility

When it's everyone's responsibility, it is no one's. Why does the buying team get left behind so easily, when it is the most important part of success in ABM?

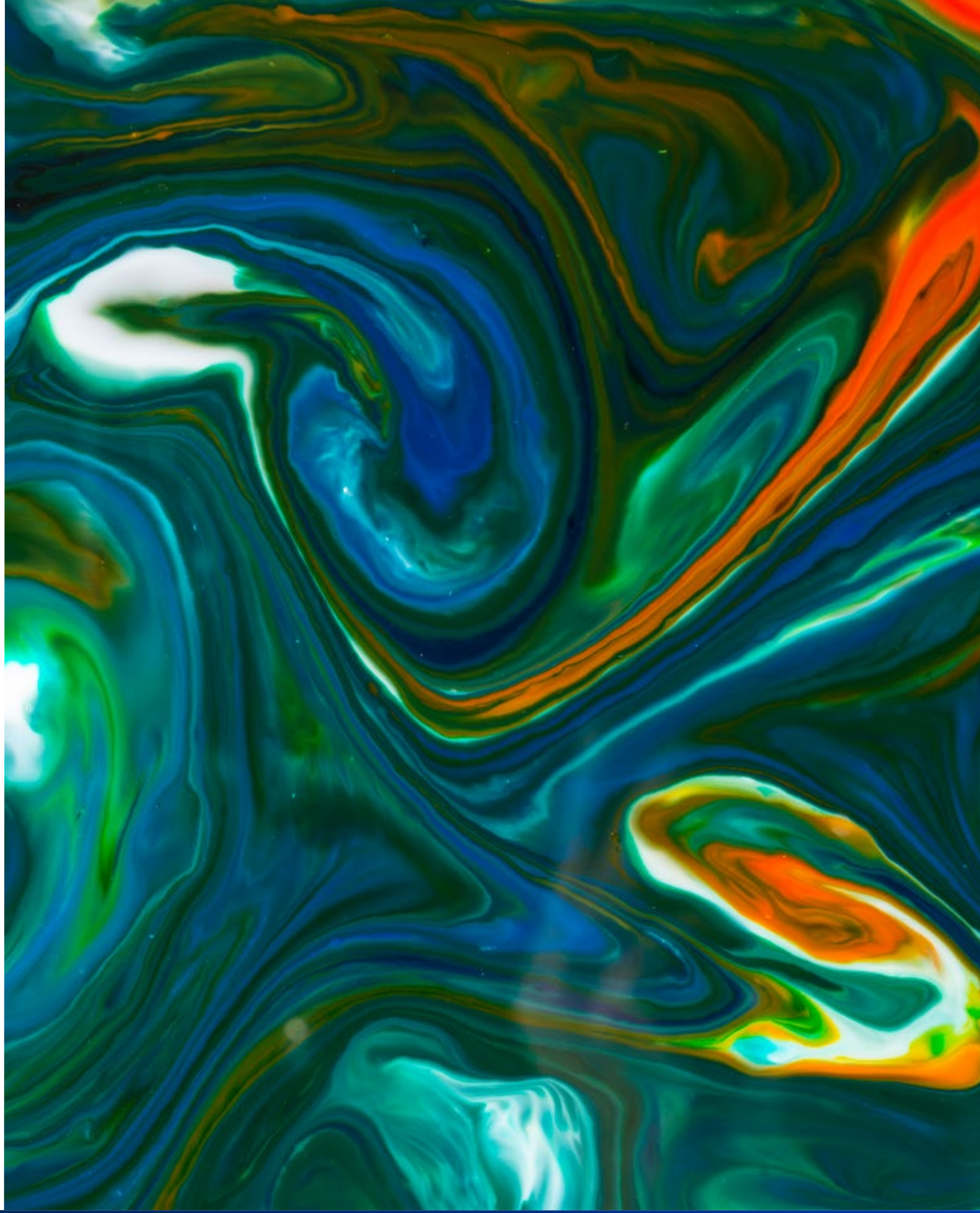
Speed. Most companies jump so fast into ABM and Enterprise motions that Sales is out in front. Marketing Operations, Sales Operations and even Marketing are behind and then get blamed for having poor processes. The impact here can be enormous.

When business requirements change so quickly, other teams need time to catch up from their SMB motions or lead generation approach. They lean heavily on what they know instead of thinking through the new go-to-market (GTM) motion before going full speed ahead.

The revenue impact of this misalignment creates enormous sales drag and lowers sales velocity. This can look like:

- No buying team plan by AEs or Marketing Ops.
- Buying team concepts focus on CXO instead of the wider organization.
- Account hierarchies aren't in place leading to poor territory planning.
- Lack of account or enriched person data so manual research is needed.
- Untargeted campaigns.
- Lead generation is focused on customer lifecycle.
- Messaging still focuses on SMBs.
- Inbound requests get routed to junior staff unfamiliar with Enterprise sales, turning off experienced buyers.

Each team and each department should focus on how to help Sales build the buying team.



Mistake #2: Thinking ABM is just lead generation for Enterprises

In the SMB world, “speed to lead” is critical and junior SDRs and Account Executives (AEs) close deals quickly as part of a Product-Led Sales (PLS) motion that is likely not heavily automated.

The expectations for enterprise deals are well known – they often include six to 12-month deal cycles with only a 2,000 to 10,000 Account TAM. More senior AEs are hired alongside a slew of junior BDRs with the expectation that high-volume lead generation will result in deals.

The problem with this expectation is that the sales and marketing teams are used to high-volume lead generation for SMB and mid-market organizations. They are measured on that deal flow and those expectations do not change when they shift their focus to the Enterprise. And conversion metrics at each stage are often based on SMB results or are assumed, with no consideration for the larger buying teams and longer deal cycles.

Naturally the conversation becomes "about the numbers."

So, what happens? Marketing and Sales try to get high volume lists of their ICPs from their target accounts and need a daily lead and call volume to maintain pipe generation at a given conversion rate. The pressure to "scale" means more BDRs and AEs are hired who now need more leads and accounts to work to justify their salaries.

This is a huge investment for any company.

What marketers often do in these situations is take a target account list organized by name and domain and do three things:

1. Email anyone with those domains.
2. Run targeted ads on LinkedIn.
3. Buy third-party intent signals against those accounts.

Essentially, this is lead generation for target accounts.

Sales eventually says ABM doesn't work because they only get marketing-qualified leads (MQLs) where those people may not be ready or are unlikely to form the buying team. Then they ask for more leads.

Sound familiar?

More savvy marketing teams will leverage existing freemium product user data to find active users from those domains and then push them to Sales as MQLs. This does work, if the GTM motion is well designed. Frequently, salespeople are the ones to mine this data for in-market accounts.

And yet, there is a different approach that is much more efficient and achieves the same, if not much better, result.

Mistake #3: Doing ABM as a series of one-off campaigns

Many well-meaning “ABM” vendors approach ABM as targeted ads by industry and domain name. Those are great tactics that often encourage random acts of marketing to hit short term goals. These tactics manifest as account ads, persona ads, or territory-based field events. They provide some results yet don’t work toward long-term buying team building.

Most companies also add an enterprise solutions page to their website along with “Contact Us” messaging about special “enterprise pricing.” Again, a start, but not an always-on approach or holistic strategy.

The messaging likely isn’t highly targeted by ICP, industry, account and role. To solve this, marketers will try to get Sales to do more work, including:

1. Talk tracks for Sales when they do get a meeting.
2. Secure web rooms for target accounts in the sale process.

These are expensive solutions that don’t drive buying team building.

What’s the solution? ABM Surround Sound Campaigns

The best approach to overcome these challenges is what I call the **ABM “surround sound” campaign.** This is an omnichannel, personalized approach where your messaging is highly targeted and automatically reacts to the right person at the right time.

And the best part? You already have the tools. ABM surround sound uses:

- Dynamic ads
- Email
- First-party signals
- Second-party signals
- Third-party signals
- Dynamic page content

Once you’ve built out your approach (more on this in a later section), you can leverage your existing messaging for each role, ICP and account in a content matrix to operationalize this campaign at scale.

How to build buying teams with ABM

Once you decide on an upmarket strategy, your first step should be to sit down with all key stakeholders in a two-day workshop to map out the GTM motion for upmarket.

The purpose of the Account Executive and BDR is to:

1. Build the buying team.
2. Facilitate the solution conversation with that buying team.
3. Close the deal.

Steps to achieve ABM greatness, operationally, include:

1. **Strategy** – We're going upmarket. What is the customer experience we provide?
2. **Requirements** – What changes and resources are needed to support Enterprises?
3. **People** – Which types of people are needed?
4. **Process** – What is our GTM workflow? Does everyone know their role?
5. **Technology** – How can automation be leveraged to scale?

What is the buying team?

In traditional B2B Sales, new salespeople are trained first as an SDR/BDR and mentored by an AE through larger and larger deals until they become an AE themselves. In very large sales teams, AEs may be promoted through deal sizes as well.

For mid-market and enterprise deals, each salesperson understands that the cold call or inbound request is a single person at the account. It is rare for that initial contact to become a closed/won sale without needing the approval of a manager or several people.

Thus, the concept of the buying committee was handed down through each leader to their teams.

As **Gartner** and other **research** has shown, buying team sizes are at least five to 15 people, varying by the size and maturity of the organization. The average size is 5.4 people and a team of four to six occurs 39% of the time. This number of people can become unwieldy for an AE to find and manage. Much of the role of a BDR or AE is *exploring* the organization to uncover the buying team – their roles, the company's process and the value story that matters to them.

Until 2015 or so, Marketing was rarely involved in building the buying team, focusing instead on the ICP lead generation for supposed "decision makers." Each salesperson had this framework in their head, and it was rarely reflected in the marketing or in the CRM data. Great enterprise salespeople will take that MQL and use it to explore that organization further.

That began to change in 2017 with Forrester's (formerly SiriusDecisions) **Buying Group Manifesto** and subsequent **updates**. Building on Jon Miller's ***Clear and Complete Guide to ABM***, the buying group concept helped Marketing Operations build ABM into a more complete technical solution.

And yet, so few companies have fully operationalized the buying team across their GTM strategy and technologies.

The reason? Few take the time to map out two key steps:

1. The GTM account process.
2. Who is part of the buying team and what does your ICP look like?

Introduction to buying team roles

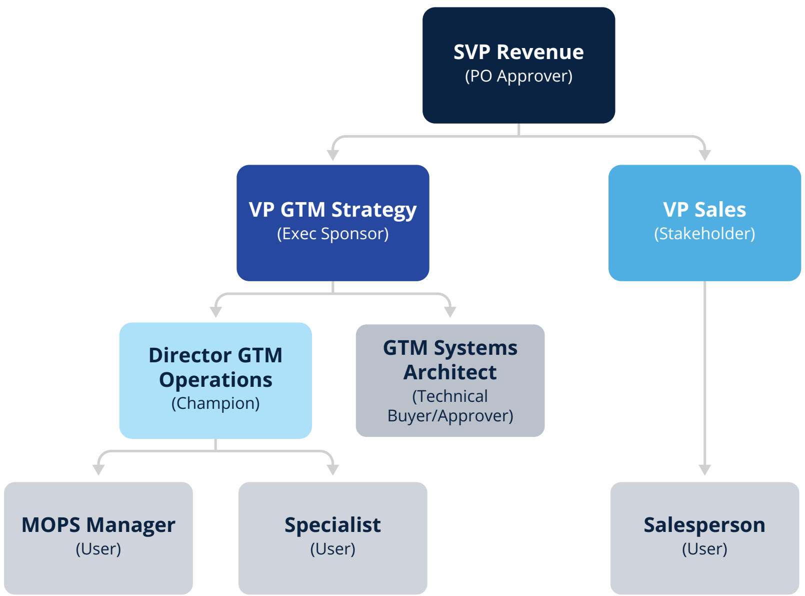
A great ABM program requires mapping the ICP, or buyer personas, to the buying team role to ensure a strong ABM motion is built out. Not everyone on the buying team fits the ICP or needs direct marketing. For example, the procurement negotiator is outside of most marketing influence.

When mapping the ICP to the buying team, also map the relationships between people and to the account, opportunity and buying team object.

In some organizations the roles may be condensed, for example, the VP of Marketing may be the PO Signer, Executive Sponsor and Contract Signer. Still, those roles should be appropriately marked and mapped for your data to support the GTM motion.

If your sales team uses sales models such as **MEDDIC** or **The Challenger Customer**, you can map those buying team concepts into your workflow as well.

Suggested mapping based on typical buying team roles



Editor's Note: This is an example mapping of buying team roles for a sales software solution.

Building Buying Teams

Buying team roles	Ideal Customer Profile (Person)?	Linked to buying team object?	Linked to opportunity contact role (should be same as buying team)?
Champion	Yes	Yes	Yes
Users	Yes	Yes	Yes
Influencer	Maybe	Yes	Yes
Buyer	Yes	Yes	Yes
Finance Approver	No	Yes	Yes
Procurement Negotiator	No	Yes	Yes
Sniper	Maybe	Yes	Yes
Technical Buyer	Maybe	Yes	Yes
Technical Approver	Maybe	Yes	Yes
Contract Signer	Maybe	Yes	Yes
Executive Sponsor	Maybe	Yes	Yes
PO Signer	Maybe	Yes	Yes
Legal Contract Officer	Maybe	Yes	Yes
Economic Buyer	Maybe	Yes	Yes
Executive Approver	Maybe	Yes	Yes
Information Sharer	Maybe	Yes	Yes

Additional resources

- **5 Key Insights About the Software Buying Team** (Gartner)
- **What is a Buying Group and Who is in it?** (Lean Data)
- **Buying Groups: The New Norm for B2B Sales** (Clari)
- **Buying Team Structure** (DemandMetric)
- **How To: Identify and Influence the Entire Buying Team** (6sense)
- **The Future of B2B Sales is Hybrid** (McKinsey)
- **Creating High Value Offers for Buying Teams** (Informa TechTarget)

For Challenger Customers

- **The Challenger Customer: Selling to the Hidden Influencer Who Can Multiply Your Results**
- **The Challenger Customer Summary**

In-market vs. out-of-market buying teams

At any given time, an unknown percentage of accounts (and buying teams) are in or out of the market for a solution like yours. Commentators pin this as 95% out of market and 5% in market. A few surveys indicate this could be as high as 20% of your target accounts during a year. These are reasonable assumptions, given many campaigns have a 1-2% average response rate.

Regardless of the percentage, there are two paths for your customer journey. In or out with different goals:

- Educating out-of-market accounts and people.
- Bringing in-market accounts and people to Sales.

Roles and goals for in-market vs. out-of-market accounts

Roles and responsibilities	Out-of-market	In-market
Marketing	• Educate to be top of mind. • Help buying team members do their job. • Understand the solution area closer than how you think of it.	• Educate the buying team on your specific solutions. • Convince buying team members to work with our team. • Identify in-market accounts.
Sales	• Mine high-propensity accounts that may not have shown signals. • Low priority.	• Facilitate the buying team to focus on your solution. • Build relationships. • Navigate the organization to fill in the unknowns.

KPIs for in-market vs. out-of-market accounts

KPIs	Out-of-market	In-market
Marketing	• Awareness • Visits and views • Social media engagement • Fill rate – Known vs. unknown for buying team	• Consideration • MQL and SQLs • Active accounts • Sales velocity • Opps created • Demos • Active buying teams • Fill rate for team
Sales	• None	• Meetings • Active opps • Velocity • Fill rate for team • Response speed

Designing the GTM enterprise workflow to support buying teams

Teams outside of Sales (like Marketing) need to understand the needs of Sales, especially when they are looking to advance enterprise deals. Those teams should understand that the Account Executive and their supporting BDRs and SDRs are *responsible for building the buying team relationships* to facilitate a solution discussion focused on your product.

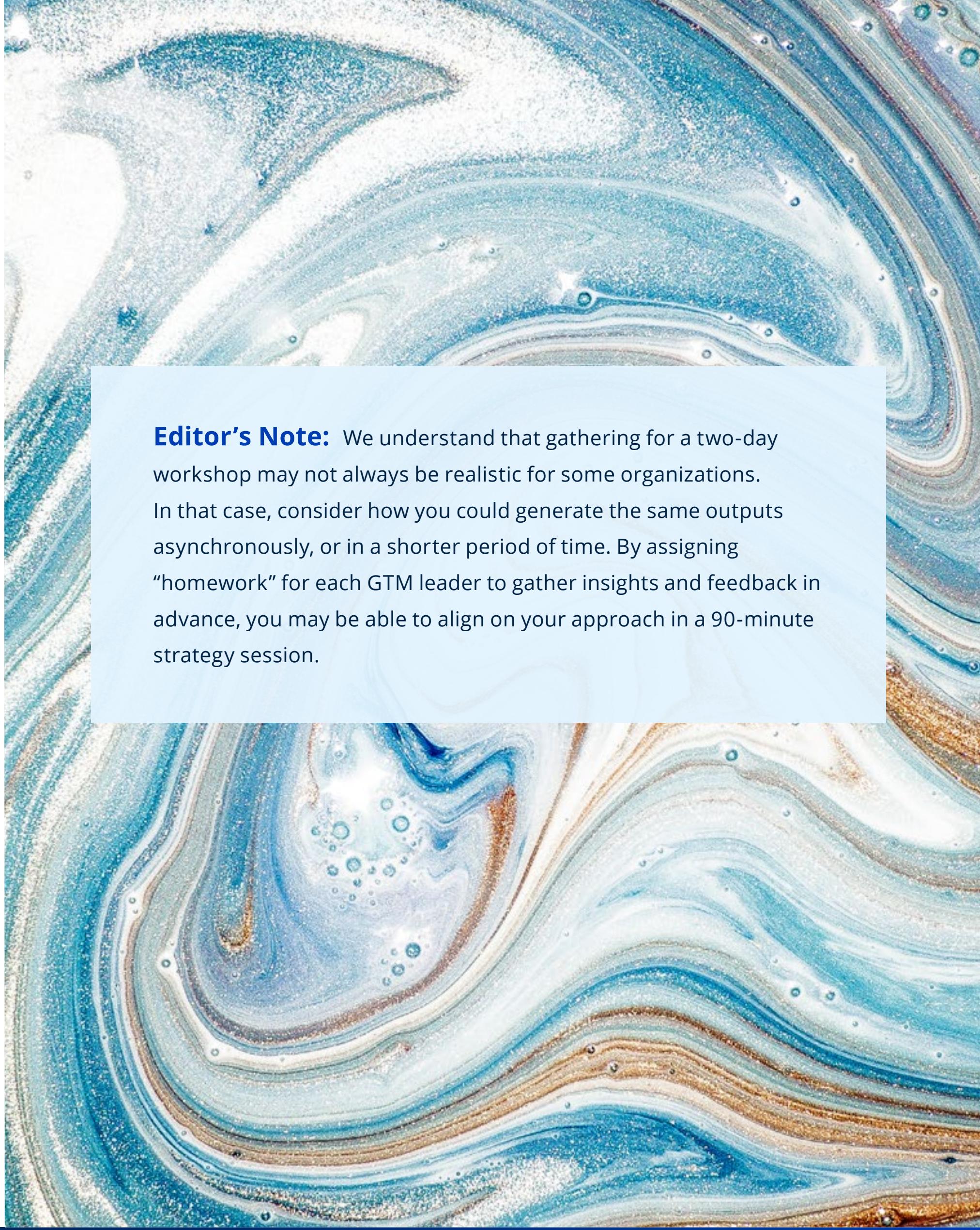
The GTM workshop

All teams should consider gathering for a two-day GTM workshop to drive the strategy before anything else is done to go upmarket. In these sessions you should go over these key questions and get the answers on a whiteboard:

1. What is the current GTM motion for all segments and products?
2. What should it look like for Enterprises?
3. How would product-led sales plug into sales motions?
4. How do we know when a set of users or an account is "sales ready"?
5. How do we identify companies in-market vs. out-of-market?
6. What is each team expected to do at each step?
7. Which systems and automations can support the process effectively while balancing the desired customer experience?

The attendees should be a mix of leaders and operators to get the most detail and value out of the workshop Here's an example attendee list:

Who	What they bring
VP of Enterprise Sales	Bring the key enterprise sales leader to provide context, goals and approve the plan. This person may leave the room after this step.
Power users of sales tools	These are top performers who love the tools and bring day-to-day insight.
Head of BDRs	Outbound and objection handling, navigation of the organization.
Head of SDRs	Inbound understanding, words buyers use.
VP of Demand Gen/ Demand Generation Leads	Campaign and content knowledge (you could also include the ABM leader).
Head of MOPs/Head of SOPs	Stack and lead flow knowledge.
Lifecycle Manager	Insights on your bow-tie funnel.
Product Manager	Background on the product funnel, metrics and how it works for enterprises.
Marketing Technology Architect	Systems familiarity, automation, scale and process mapping.



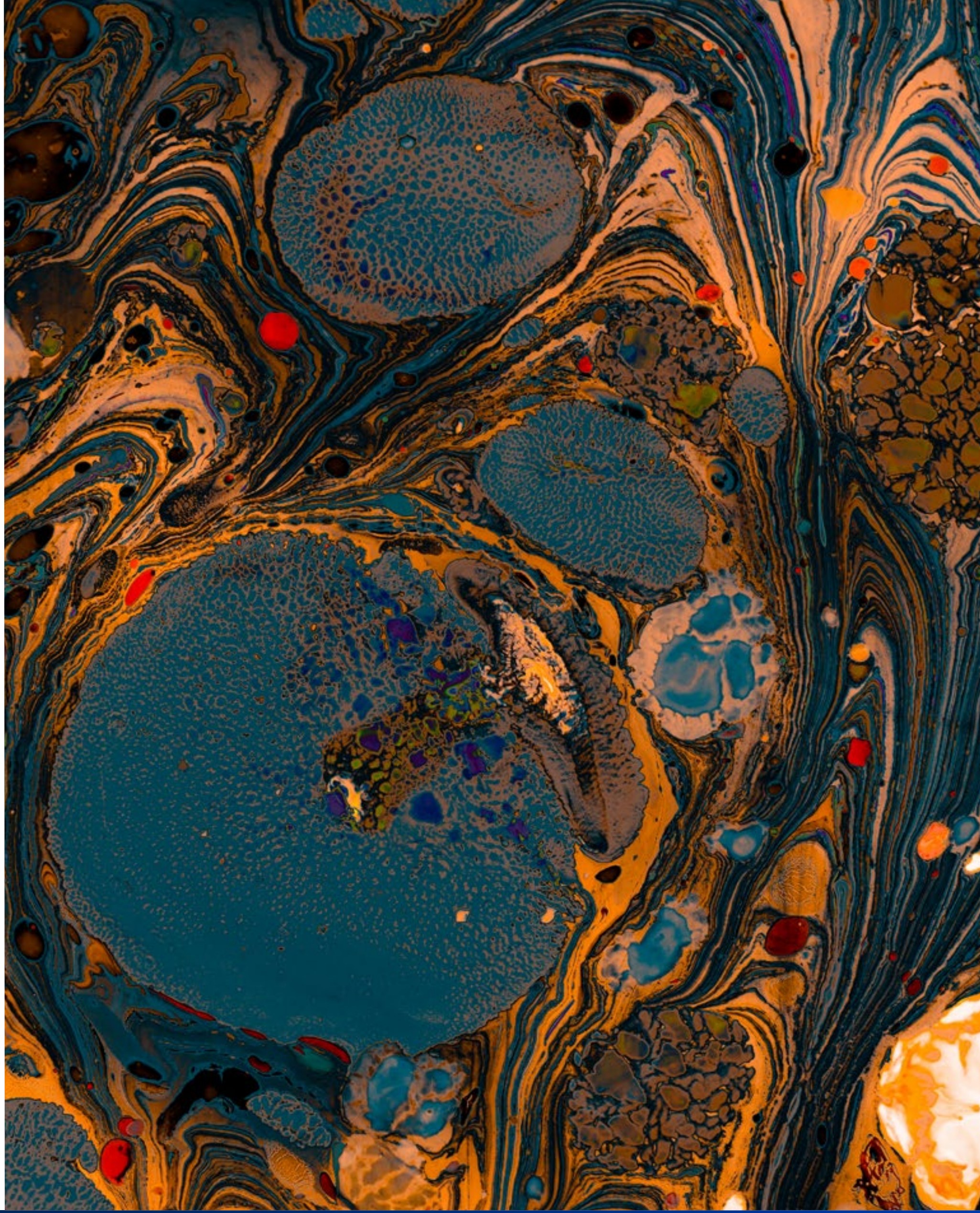
Editor's Note: We understand that gathering for a two-day workshop may not always be realistic for some organizations. In that case, consider how you could generate the same outputs asynchronously, or in a shorter period of time. By assigning "homework" for each GTM leader to gather insights and feedback in advance, you may be able to align on your approach in a 90-minute strategy session.

I recommend the CRO and CMO begin the conversation, set the goals and guideposts, and then leave. Frank discussion often gets suppressed with the C-suite present, as it's human nature to look to leaders for answers.

After the workshop, marketing operations architects should draft several process charts, including:

- **Executive view:** High-Level GTM Workflow: Before and After.
- **Functional lead view:** Mid-Level GTM Workflow: Process and Systems Level.
- **Implementer view:** Detailed Process Chat: Systems, data flows, excruciating detail.
- **Resourcing plan:** Including budgeting, headcount and technology required.
- **Project plan:** A slide or GANTT chart with a schedule, deadlines and a launch date for your GTM motions.

These plans should be circulated for accuracy and then approval. The documents will act both as the project plan, as well as the roadmap for implementing the ABM Strategy.



Team responsibilities across your organization

Each team has a role to play in aligning to the buying team, and leadership should be clear on what that role is.

Sales responsibilities

Salespeople build relationships. Salespeople, BDRs or AEs are expected to navigate the target account to *build out the buying team and facilitate* the conversation to solve a pain with their product.

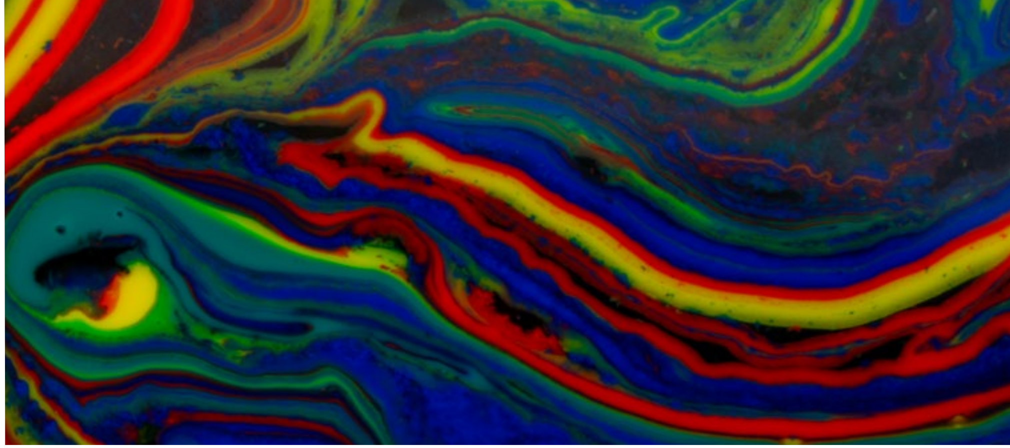
What does “building relationships” and “navigating the organization” look like? Joshua Perk **points out** that salespeople targeting CXOs or leadership purely from account signals may miss important aspects of timing and building the buying team. He recommends understanding the organization from other levels to help understand the “value hypothesis,” i.e. why you *think* it’s the right time to reach out. Later on in this e-book, we’ll also discuss data and signal sources that can help you better understand who to reach out to at a specific time and how to tailor your messaging accordingly.

I recommend always including potential users and individual contributors in the buying team to help Sales infiltrate that value story into the target organization and bring together exactly the right people.

Use BDRs as relationship builders, not email marketers

Since the advent of sales email automation tools around 2013, the pendulum of email nurture has swung from demand gen back to Sales. These tools offer powerful capabilities for reps managing territory communications, call tasks, etc., while, at the same time, their sales managers get better insight into activity levels.

On the flip side, many teams have actually been negatively affected, because these tools have effectively become high-volume email spam machines. Salespeople aren’t equipped – and shouldn’t be – to be email list managers, email delivery experts and marketing automation specialists. Salespeople are relationship builders, which is why I say the purpose of the BDR is to build the buying team in partnership with the AE.



Buying teams are more than CXOs or decision makers

Most sales reps are told to target C-level executives because they "make the decisions" or "hold the budget." Yet, when you think about how you buy something in Sales, SOPs, MOPs, Marketing or similar spaces, is that anywhere near what's actually going on?

No.

Research is first either pursued by an energetic practitioner on their own, or it's assigned to be done by an intern or junior manager who then brings a few vendors and ideas to a manager or director.

Small decisions can be made right at this level, usually defined by financial approval bands. Larger spend decisions or larger impact decisions – software changes that may impact multiple sub-teams or departments – need more input from departmental leaders and, yes, potentially by C-suite approvers.

The way this works most of the time, is that directors and VPs bring a one to three-slide presentation or short email proposal to the approver or CXO to say, "Please approve this $500k spend to drive $10M pipe or reduce costs $2M … "

And the CXO approves, with very little investigation beyond the business case.

Some organizations may have more sophisticated internal approval processes in place which can slow down, or sometimes, accelerate the deal.

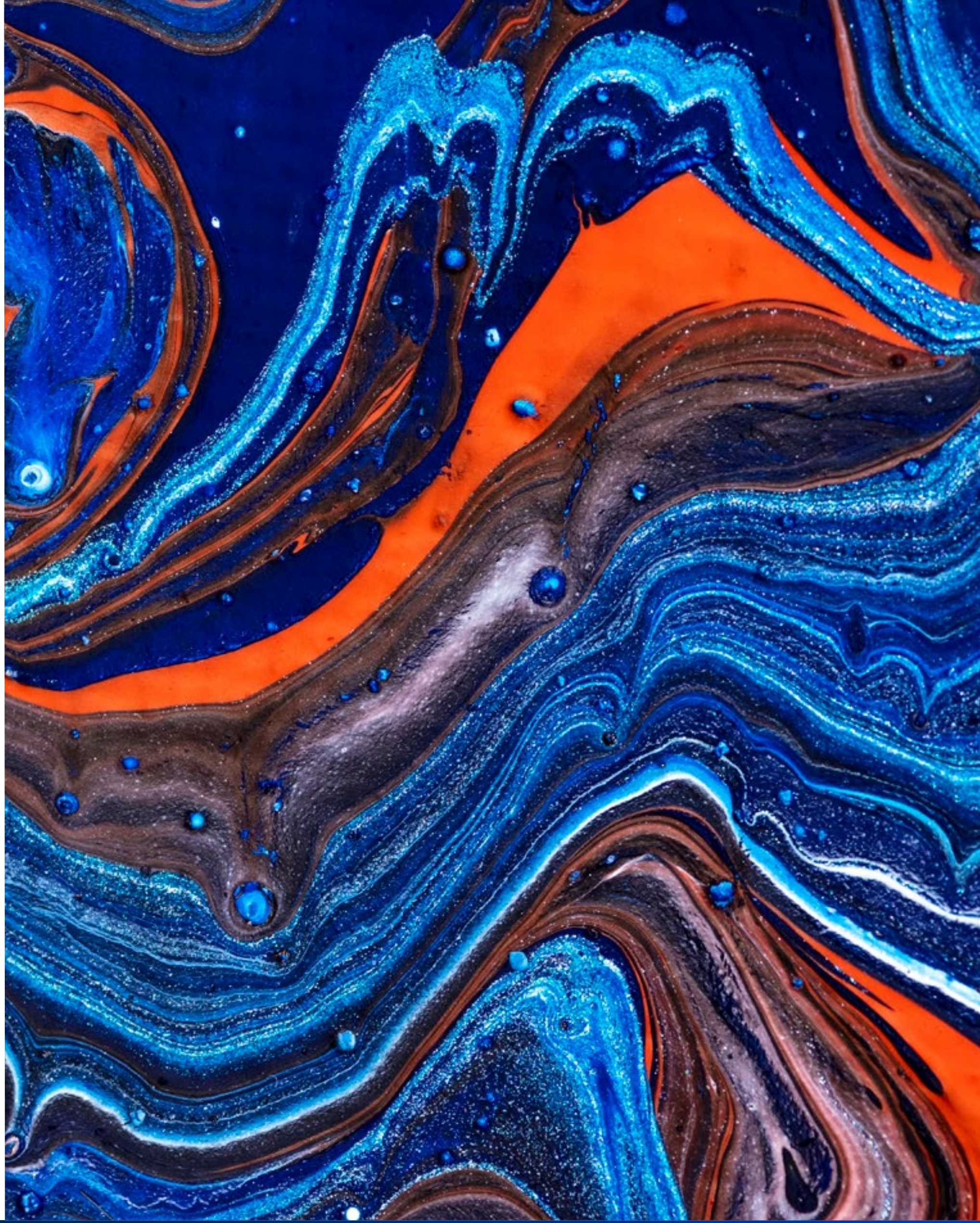
Another pretty obvious reason for avoiding the CXO as a first contact is that they rarely respond directly. When a rep reaches out to a large company CXO, if their interest gets piqued, they will usually then forward that email to a direct report (often a VP) who might then forward it to someone to actually take a call and vet the solution. In this case, the call happens because it looks like a CXO wanted it to, but the sales processes could get slowed down for a variety of reasons along the way. Sometimes the director or manager who actually attends the demo call won't see the potential or value and will decline further conversation.

Or perhaps it isn't obvious how your solution helps the current priorities, and the middle managers feel threatened by upending current plans, so they refuse to consider the vendor seriously.

What I've found is that the managers and directors who are most likely to want to change vendors, have particular expectations that need to be met to even discuss making a change in the first place. Often, they want the respect and support of the vendor who has approached them first. If you can create this trust with potential buyers, your champions are now well positioned to:

1. Understand the change.
2. Understand the implications of the change.
3. Build that business case upwards (with help).
4. Get help from the vendor to crystalize the need and get CXO attention at the right moment.

A long-term benefit of this bottom-up approach with top-down business case support is that the relationship is likely to last much longer, netting a higher customer lifetime value (CLTV).



Marketing responsibilities

Marketing's responsibility is to provide Sales with in-market accounts and buying team engagement at the ideal time to begin a sales conversation. Marketing should provide as much context as possible to the Account Executive so the AE and BDR can successfully navigate the organization, fill in the blanks in the buying team and build strong relationships.

Marketing's role is to support the selection of the total addressable market (TAM), serviceable market and target accounts. Marketing should work with Product to determine the ideal customer profile (ICP) for:

- Accounts by industry
- Buying team roles and personas
- Product-led sales (users that can be upsold)

A Content Personalization Matrix example

ICP/Content	Subject line	First content block
ICP: CIO	CIOs Under Pressure to Deliver SOX	SOX Compliance is a huge issue we solve
ICP: Champion (Dir+)	Want to Solve SOX Fast?	Selecting SOX solutions is a slog we solve
ICP: Manager of Users	Day to Day of SOX Compliance	Take the drudgery out of SOX and automate it

Once these targets have been identified, it's important to then create or update the appropriate messaging for each person and account.

I encourage you to organize your campaigns around the buying team ICPs with targets by stage and identified missing buying team members. Use the 'surround sound' campaign approach mentioned earlier to drive known and unknown members of the buying team into your reps' hands.

Unsurprisingly, Marketing should own the development, creation and execution of the ABM surround sound campaign content and targets. MOPs should automate and support these programs at scale. A Content Personalization Matrix (see below) is a valuable tool to start aligning buying team members to content quickly and at scale.

Thus, successful ABM teams leverage ABM Surround Sound and the **Nurture Waterfall** to achieve these goals.

Editor's Note: It's worth mentioning that in this e-book Josh refers to ICP in terms of people rather than an account entity. We understand that some organizations use ICP to determine best-fitting accounts. Regardless of the terms you use, establishing person-oriented criteria and best-fit account criteria is helpful.

Team Responsibilities

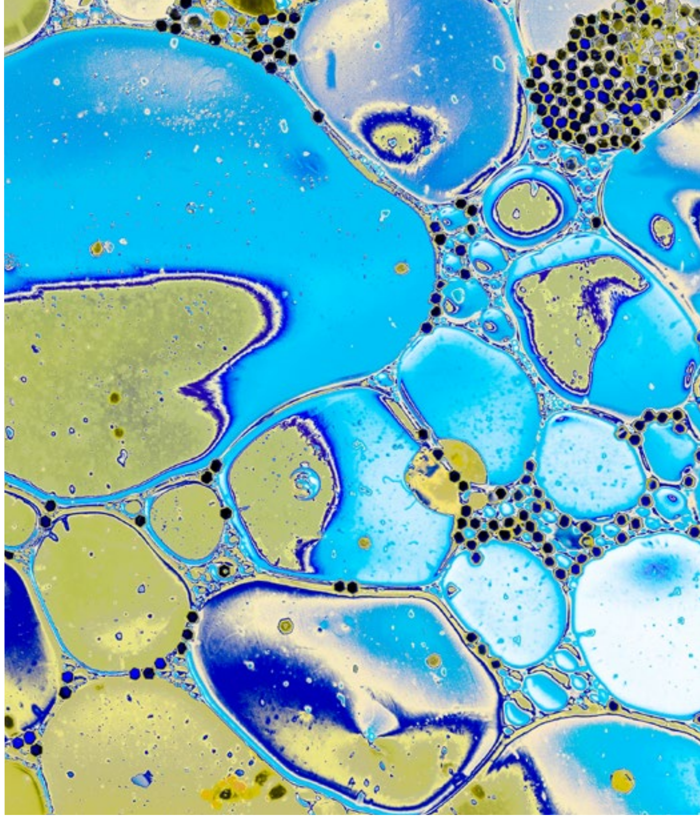
Example of a complete Journey Session with sample ROI

Area	In-market	Out-of-market
Who	• In-market accounts = First and second-party data • Industry = Manufacturing • Buyer Personas: CIO Decision Makers, Accounts > or = 50 users, Directors of IT, ITSM Managers	• Out-of-market accounts = No signals at all + High propensity to buy from us • Industry = Manufacturing • Buyer Personas: CIO Decision Makers, Accounts > or = 50 users, Directors of IT, ITSM Managers
Why are we communicating?	Ask for a meeting	Educate each member on the problem; keep us top of mind
Content	• Industry and persona-specific, dynamic website content • Ads on LinkedIn • Sales outreach • Retargeting	• Ads on LinkedIn • E-books • Webinars and videos • Articles (how to's) • Research briefs and whitepapers
Channel	Email, Ads, Web, SEM, SEO	Email, Ads, Web, Syndicated Content, SEO, Video
Good exit (Goal)	Schedules a meeting > exits nurture stream	• Visits website • Fills out form
Bad exit	• No meeting within 90 days, push to out-of-market nurture flows • Unsubscribes, bad data, etc.	• Unsubscribes, data removal, no response in 270 days • No change to account status in 360 days
Estimated ROI	$5,000	$2,500

Engage the buying team with an ABM Surround Sound omnichannel program

Here you can use my **Journey Session Framework** to focus your omnichannel approach for in-market or out-of-market accounts and buying group members.

Team Responsibilities



Example of potential in-market account buying team

Buying team role	Complete profile in MA	Known?	Permission to Communicate (Phone/Email/Mail)	ABM action
Champion	Yes	Yes	No	Surround sound by stage, sales calls, get meeting
Users	No	Yes	Yes	Surround sound by stage, increase usage
Economic buyer	No	No	Yes	Run ABM surround sound vs. account + ICP
Technical approver	Yes	No	Unknown	Run ABM surround sound vs. account + ICP
Executive sponsor	No	No	Unknown	Run ABM surround sound vs. account + ICP

In this example scenario, since users and the economic buyer have provided their permission to be communicated to and we know some information about the champion, it could make sense to begin a Surround Sound program. Desired outcomes could include:

1. Users provide more information.
2. Users encourage the champion to expand the relationship.
3. Champion to contact Sales.
4. Champion to bring vendor research and recommendation to the economic buyer.
5. Find the other roles through first, second and third-party options to facilitate direct and indirect communications.

A Surround Sound campaign of this nature supports Sales in exploring an account's structure and bringing together the right people the champion needs to advance the sale and solution.

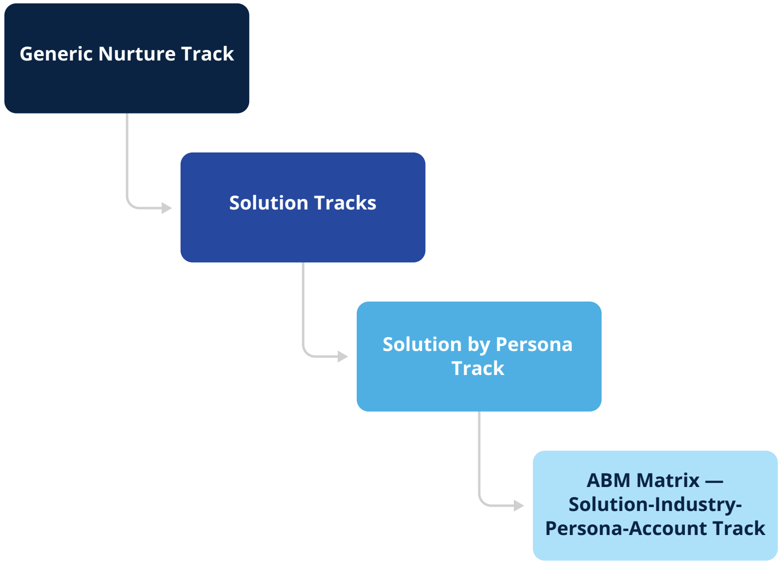
Team Responsibilities

The **Nurture Waterfall** is another part of the ABM Surround Sound approach. Consider it an email-centric strategy that also takes advantage of all your channels that matter to your audience.

Example of a Nurture Waterfall with the goal of obtaining a sales meeting with a buying team member at an in-market account

Nurture track	Considerations	Goal
Generic	Enrich your database by asking the person to reveal more information about themselves.	Enrich the prospect's record with enough information to move them to a more specific track.
Solution area	Your need to provide enough information to educate the person on a solution area.	Progress them to the role or account track.
Solution by persona or role	This is an opportunity to provide more specific language tailored to that person's role.	Advance them to the account/industry track.
Solution-Industry-Persona Matrix	Be sure to provide more specific language for their buying stage. This could vary by buying team details.	Push them to the account track or an MQL.
Account-specific	If the buying team is ready, this is an opportunity to get a meeting with Sales.	Get them to a meetings with Sales.

Example of the Nurture Waterfall in action



Marketing Operations (MOPs) responsibilities

MOPs' role in ABM is to *arm BDRs and AEs with insights about priority accounts and the buying teams within them* so they can focus on building relationships and generating deals.

Marketing Operations teams are generally well positioned with the technical knowledge to advise GTM leaders on how to best define new GTM processes to go to market at scale. Great MOPs teams work closely with their ABM stakeholders, including Sales, SOPs, Marketing, Creative and Product to scale up. Your specific use of technology, data and automation should align to the GTM strategy you defined in "The Workshop" mentioned earlier. I've noticed that it's far too easy for Marketing and Sales to go too fast to add new ABM tools before they fully understand the problem they are trying to solve. This is why the GTM strategy and workflow conversations should take place first – the outputs from those sessions will help you determine how best to automate for a particular audience.

Key competencies for Marketing Operations teams to scale ABM effectively include:

- Using a content matrix for dynamic personalization.
- Enriching account and people records.
- Executing ABM 'surround sound' automation.
- Lead to account matching automation.
- Upgrading funnel lifecycle views to accounts and buying teams.
- Monitoring and reporting on data whitespace.
- Building account propensity models, plus in-market and out-of-market data.
- Automation of account research using generative AI (GenAI).
- Buying team data structures.
- Modeling buying team readiness and account lifecycle stages.

Requirements for the Enterprise GTM Motion

As part of the GTM Workshop, MOPs should gather requirements from the business teams to ensure there's a clear way to execute against the established plan.

For example, ICP is an important requirement that will shape the targeting of your Surround Sound ABM campaigns. In some organizations, you may receive ICP criteria from your product team or sales leadership. In other organizations, you may need to work with MOPs to tap into historical deal data to build out your ICP. For added context, machine learning or intent data tools can help you identify which target accounts and buying team members are in-market to buy a particular solution.

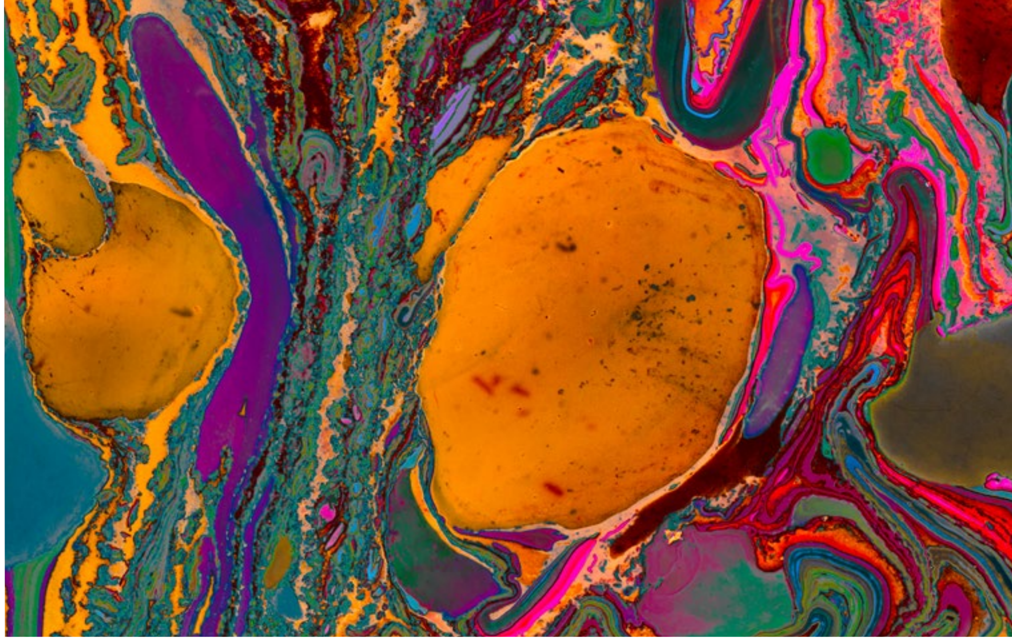
Ideal Customer Profile (ICP) Frameworks

In order to best help Marketing build effective targeting for their campaigns, MOPs should have a clear understanding of the ICP for each business role involved in a deal at each target account. The ICP should include the Buying Team Role as well as their buyer persona. ICP information should be specific and detailed so MOPs can operationalize it. Marketing Operations should be entrusted to know how to do this and to effectively elicit this information from internal stakeholders as well as datasets.

Editor's Note: Josh's use of an ICP Framework allows you define "fit" in terms of both demographic and firmographic criteria. Some may refer to this as a persona map and use ICP to detail best-fitting accounts.

Example of an ICP Framework

Persona	Marketing automation manager persona	CIO persona
Possible titles	Marketing Automation Manager, Senior Manager, etc.	CIO, Chief Information Officer, etc.
Account type	Series B startup	Public Company of $500M-$1B
Industry	NAICS: 12XX Fintech	Technology, Media
Challenges (Content)	• Not enough time to scale this up • Not enough engineering skills	• Keep costs under the curve, uptime, compliance • Reduce tools
Solutions to consider	iPaaS, Low Code, ETL	Offshoring, automation
What is needed to advance the sale	Confidence the tool works ('show me' technical demo)	Business case, team's confidence in solution
Buying team role	User, Champion	Executive Sponsor, PO Approver



Target industries

An early-stage company may only focus on one or two industries. It's important to state this limit up front so MOPs and Marketing focus their efforts on those industries. A propensity-to-buy model can also help identify a target account list by industry from your TAM once you have enough purchase and win/loss data.

Target accounts

In an early-stage company or an early-stage ABM program, the target account set should be focused on the most likely to buy non-customers. These can be lookalikes based on win/loss reports.

As your ABM program takes flight, a more advanced approach is to use **Machine Learning regression models** to build a statistically sound propensity model.

Avoid equating target accounts with your TAM or SAM. When this happens, GTM teams will often rank the target accounts into classes such as A, B or C and assign all accounts to reps. Instead, try a more targeted approach by using modeling to identify those A accounts with the highest likelihood to buy in the next year and assign those A accounts to salespeople. Assigning B or C accounts to salespeople will almost always result in BDRs prospecting into B and C after the A accounts don't respond quickly enough. Your models for capacity, revenue targets, etc. need to balance this out.

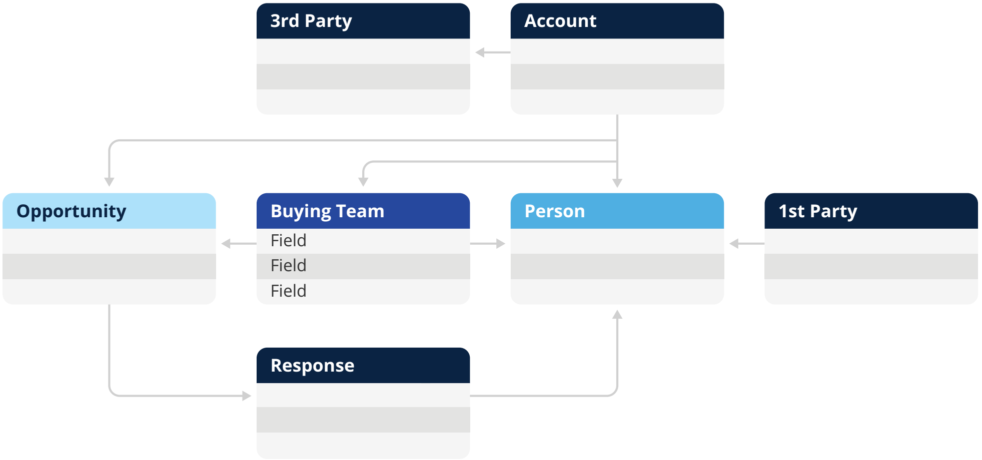
Salespeople need to remember (and guardrails should exist) that the highest propensity accounts matter the most and they should build the buying teams there, even if that means playing the long game. The thoughtful use of intent data or propensity models can help with Target Account list building as it helps you focus on the in-market segment much more than the "we want these accounts" wish list.

How to structure this data in your CRM

Once the GTM process and requirements are better understood, you need your CRM, data warehouse, and marketing automation platform (MAP) structured to understand the relationships between buying team members, roles, people and accounts – among others.

Although there are many ways to approach your systems when building the buying team for ABM, one option involves designing a schema to link buyers together with their buying team and account.

Example of an account-based marketing database schema



In this basic approach, you can see that one person can belong to a buying team at an account related to one or more opportunities, and sometimes multiple buying teams at that account. Each person can respond to an ABM campaign where that channel and asset information is stamped into a response object. The response data can then be used to help analyze the funnel stages and gather insight into which marketing programs are most effective at driving revenue.

Using the Data Enrichment Waterfall to arm Sales with information

Enrichment refers to the use of outside datasets to supplement your existing account and people records with critical details such as phone number, industry, financial information and other details that help improve the quality of your personalization and sales communications.

Understanding types of data and signals

First-party data sources and signals. This can include data from your own websites and products. Utilizing first-party user data, you can identify individuals at a company to build up the account team and use domains to identify surges in usage. By tapping into your own first-party signals, you can identify in-market people, accounts and buying teams.

Second-party signals. Second-party signal providers gather behavioral data from their own web properties and channels to help you understand the topics and solutions buying teams are researching. Given that second-party intent data providers are often membership-based, you can identify both the accounts that are in-market, as well as the individual buying team members with a high degree of accuracy.

Editor's Note: Informa TechTarget is in the category of second-party signals. Our precise intent data allows you to act fast to engage in-market accounts and the buying team members within them who are actively researching solutions like yours.

Data enrichment sources and use cases

Enrichment options	How data is captured	People	Accounts
First-party signals	• IP Reverse Lookup • Form Fills • Email tracking • Web Tracking	• In-market people • Specific roles and identify buying team members	• In-market accounts • Identify new accounts
First-party user data	• Product usage data	• Individuals at a company to build a buying team	• Domains to identify surge in use and individuals to build a team
Second-party signals (from intent data)	• Membership based "walled gardens"	• In-market people • Build the buying team and find members missing from CRM • Behavioral context on topics researched	• In-market accounts • Identify new accounts
Third-party data list providers	• Data providers • Submitted data • Scraping • Public records	• Fill in direct dial, title, roles, email, etc. • PII • Helps build the buying team and personalization	• NAICS, SIC, address, and DUNS numbers • Reference information used for target account identification
Third-party signals	• Third party sites • Account matching • IP Reverse Lookup • Web Tracking • Cross site cookies	• Find lookalike audiences for your roles	• Potentially in-market accounts

Third-party data sources and signals. There are a range of third-party data and signal providers. These data providers help you fill in basic demographic and firmographic information, including direct dial, title, role, email, PII, NAICS, SIC, address, and DUNS numbers. Third-party signals can help you identify in-market accounts, and at times, in-market individuals, but the reliability of individual data can vary greatly.

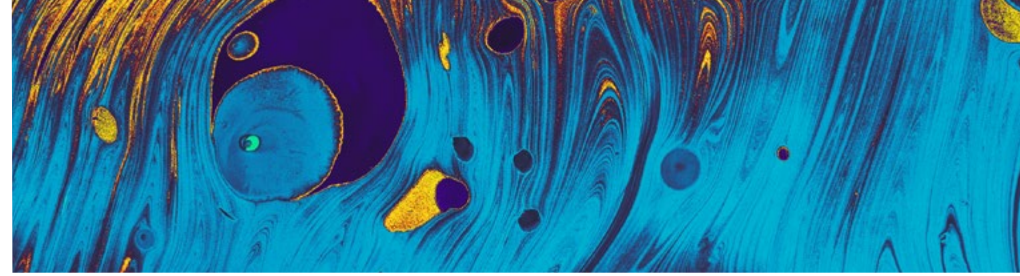
Using intent signals and in-market signals effectively

MOPS and demand generation practitioners have had access to first-party signals for years. And yet, the question has always been, “What’s the best way to use them to accelerate a buyer’s journey?” and “How do we engage with in-market vs. out-of-market people and accounts?”

And with a variety of vendors providing additional second and third-party datasets, MOPs teams are in the best position to bring all these signals together to help Marketing and Sales identify which accounts are in-market and which individuals comprise the buying team. Thoughtfully automating the responses to these signals can even accelerate the journey further and help streamline building the buying team.

Activating data for the ABM Surround Sound Program

Surround Sound actions	People	Accounts
First-party signals	New known buying team members nurture and automated contact. Use the nurture waterfall to ask buying team to reveal more about themselves before sending to Sales. Identify minimum buying team readiness for sales conversations.	In-market accounts. If champion or key buying team members are known, ask Sales to follow up. Begin to fill in buying team blank spaces.
First-party user data	Are buying team members also users? Which users are the most engaged? Which users need prompting to onboard, adopt, and more?	Match domains to target accounts. Identify buying team members for automated outreach. Ask Sales to leverage heavy users to identify buying team.
Second-party signals (from intent data)	Build and map out the buying teams for target accounts. Push known audiences to ad platforms to find lookalike audiences. Automatically adjust nurture paths for known buying team members. Activate email and sales campaign activity around buying team members.	Build and optimize target accounts lists. Help Sales prioritize in-market accounts. Find specific domains in your target accounts and ICP buying roles you are missing to drive ads.
Third-party signals and list providers	Automatically retarget known account buyers.	Help Sales prioritize in-market accounts.



Buying team readiness and lifecycle stages

One challenge MOPs and Sales often struggle to resolve is figuring out when an account and its buying team are most "ready" to receive a sales call from a rep. The answer will vary widely based on your industry, sales process and cycle, and product portfolio and complexity.

Gartner, and others, have shown that many buyers are often 59% to 80% of the way through the awareness-to-consideration journey before they ask to speak with a salesperson. As a result, most organizations are eager to engage with potential buyers earlier in their research cycle, but without the appropriate sources of data and insight, it can be quite difficult to estimate where a buying team is at in that journey.

This is where models for buyer "readiness" come into play. Regardless of which model you choose, do so consciously and in partnership with your Sales counterparts. This is best established as part of the GTM Workflow Workshop. You could choose an initial threshold based on assumptions until you have enough data to model a more efficient path.

Here are considerations for model building:

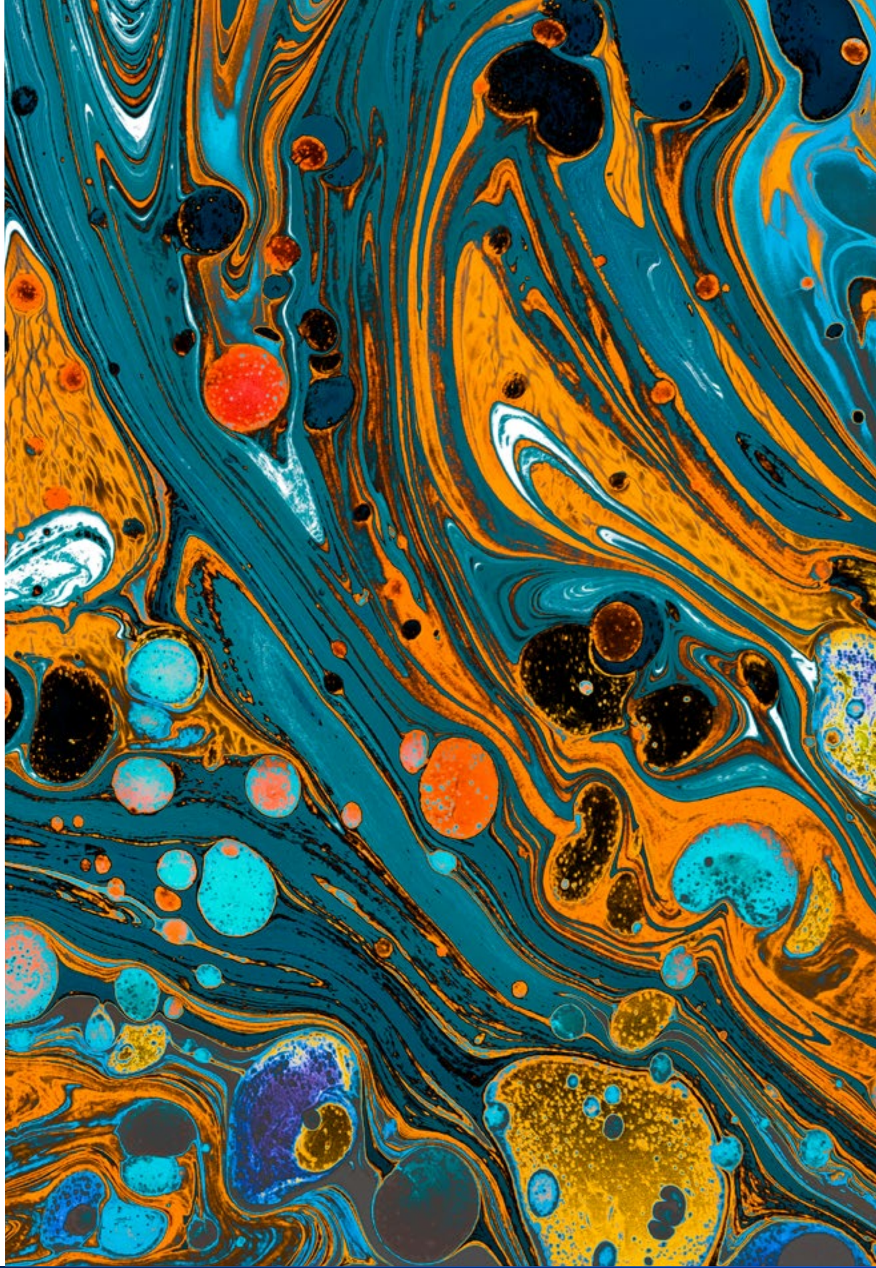
- How much of the buying team is known ***and*** engaged in some way?
- Which members of the buying team are engaged?
  - If the champion and economic buyer are active on our site, do we call them?
- How much usage does a target account have with our product?
- How many users are in the product and without a full contract?
- What amount of content consumption is by people related to a target account?
- How is engagement defined (usage, content types, time on site, etc.)
- Hand raisers: How many asked to speak with Sales? Is this more than a person MQL? Does it mean an account and buying team are fully ready? What should the next step be for Marketing and Sales?

Metrics MOPs should monitor

ABM is heavily reliant on data to drive customer experiences and improve outcomes. I recommend that MOPs teams monitor the following tactical operational KPIs to ensure proper support of the business.

Metric	Defined as	Notes
People fill rate	% of people with all key fields we need	• Your database • Enrichment services • Removing junk values in key fields
Buying team known fill rate	% of roles filled in the buying team with known profiles	• Your database
Lead to account matching	% of people orphaned	• People not attached to an account properly
In-market rate	% of accounts estimated to be in market	• Third-party account signals • First-party account signals • % of active people in the buying team
Active buying team %	• Which % of your buying teams are active • Which % of the buying team is known and active	

These operational metrics are important in understanding the full picture of pipeline generation at target accounts and other funnel metrics.



Team Responsibilities

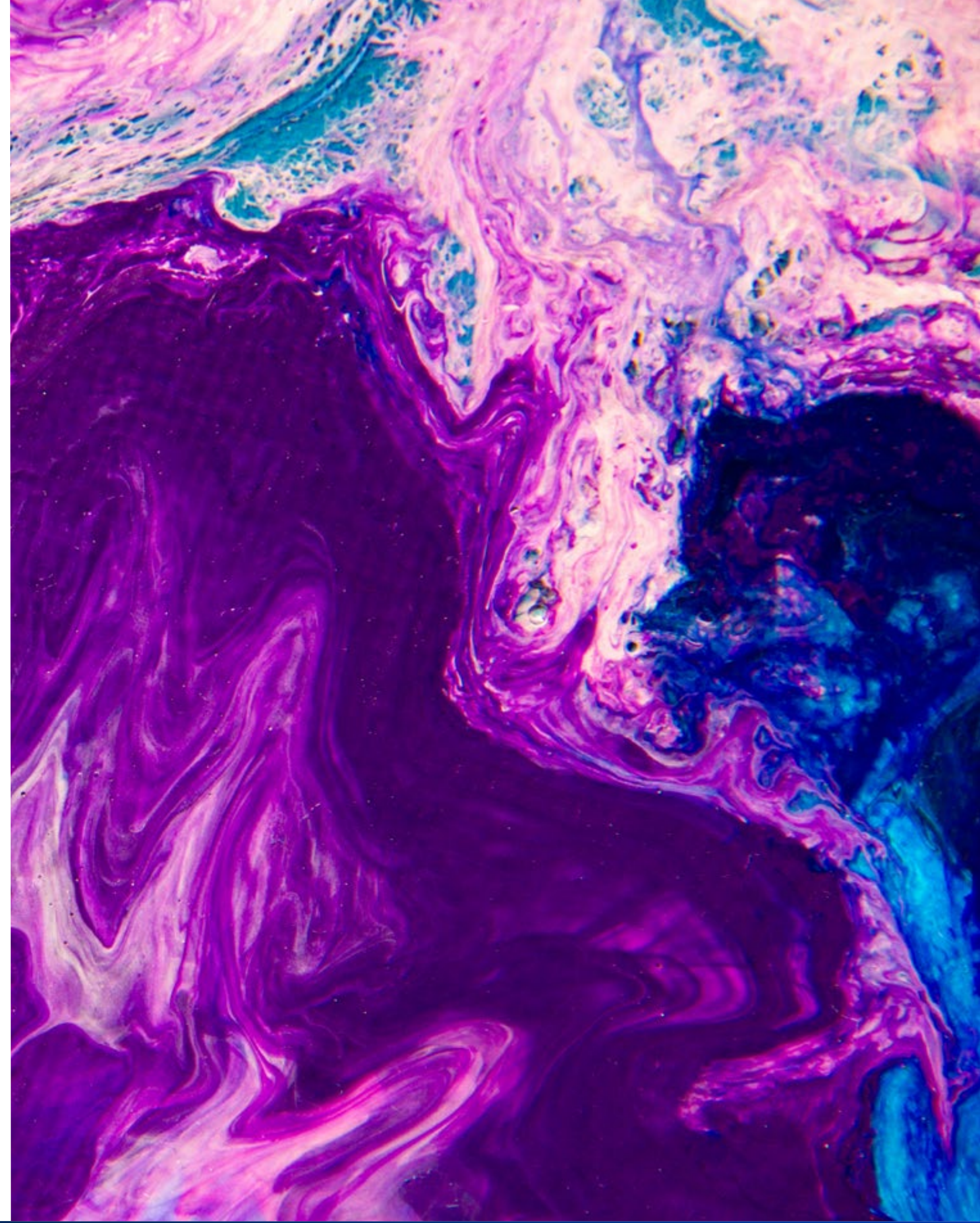
Tools

Marketing Operations teams generally work closely with Sales Operations, RevOps and CRM teams to automate many GTM workflows. ABM is no different and it is perhaps ***the*** GTM workflow.

There are GTM platforms that can support the ABM buying group workflow well when set up with a clear strategy and appropriate automation related to accounts.

Systems to consider and explore, include:

- Composable workflow builder platforms
- Data automation engines
- Data enrichment engines
- Account hierarchy builders
- People hierarchy and relationship automated linkers and visualizers
- Lead to account matching engines
- Lead and account routing engines
- Generative AI for research and summarization



Team Responsibilities

Sales Operations responsibilities

In partnership with MOPs and Sales, Sales Operations teams are there to support Sales in building the buying team. The exact boundaries between MOPs and SOPs will depend on your individual organization.

SOPs roles and responsibilities often include:

- Defining rules of engagement (ROE) or territory rules
- Territory assignment
- Lead to account matching
- Capacity management for inbound, outbound and account ownership
- Buying team data structures and visuals
- Account and logo metrics
- Generative AI for automation of demo and meeting action items
- Removing friction from the selling process
- Sales enablement and frameworks

SOPs teams are often faced with an ongoing backlog of requests from Sales relating to lead and account insight, as well as workflows and productivity. Strong SOPs practitioners manage these evolving needs in close partnership with MOPs.

Conclusion

As you can see from this comprehensive guide, implementing and executing a successful ABM strategy requires end-to-end management of the internal and external customer experience.

It's clearly a team sport, requiring tight synergy across marketing, sales, MOPs, SOPs and others. Each team and person needs to know exactly what is expected of them, and when and where to pick up the baton.

Before any collaboration can really kick off or handoffs can be made, the goals, strategy and targets for your approach need to be defined. And, as I've said before, ignoring the buying team can doom your ABM program from the start. Work closely with fellow leaders within your organization to reinforce the value of building the buying teams and everyone's role in doing just that. Running a GTM workshop, if resources and time allow, can do wonders for strategically setting your organization up for success.

With a strong operational partnership between MOPs and SOPs, you can ensure the right sources of data are in place, including your own first-party and historical campaign data, as well as second-party purchase intent data signals or third-party demographic and firmographic data. These sources of insight can power your Surround Sound ABM campaigns and drive richer, more personalized sales interactions.

It's likely that ABM looks a little bit different at every organization depending on your size, maturity, industry and other factors. Regardless of your unique ABM needs, focus on building and engaging the buying teams at target accounts to fuel sales engagements, build more pipeline and win more deals time and time again.

For more information on Josh Hill, check out his website or connect with him on LinkedIn. Get in touch with Informa TechTarget today for more insight into how we can support your ABM needs.

About Informa TechTarget

Informa TechTarget (Nasdaq: TTGT) informs, influences and connects the world's technology buyers and sellers, to accelerate growth from R&D to ROI.

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- Intent and demand generation that more precisely targets and converts

Informa TechTarget is headquartered in Boston, MA and has offices in 19 global locations. For more information, visit **informatechtarget.com** and follow us on **LinkedIn**.

About Josh Hill

Josh Hill is a GTM technology and operations leader who builds go-to-market infrastructure for the full customer lifecycle. He has built and led global teams at rapidly growing enterprises to achieve efficient growth stacks. Josh's expertise is in GTM Architecture, omnichannel programs and technology, demand generation, campaign operations and funnel infrastructure.

Josh has over 20 years of experience in technology, sales and B2B marketing. He has worked with dozens of organizations and thousands of marketing operations professionals to accelerate their funnels and careers. He is the author of *The Marketing Rockstar's Guide to Marketo* and formerly of **marketingrockstarguides.com.**

Josh holds an MBA from the University of Arizona and a BA in Economics from Brandeis University.

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