



Easy and Actionable Account-Based Marketing

Unlocking faster speed-to-lead at lower cost



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01.

Introduction





Easy and actionable account-based marketing (ABM)

ABM is one of the buzziest words in demand generation, and for good reason:

- 81% of B2B marketers who measure [ABM ROI](#) said it's higher than other marketing initiatives.
- Companies that use ABM generate 50% more [sales-ready leads](#).
- 60% of companies report a [revenue improvement](#) of at least 10% in the first year of their ABM program.

At the same time, building an ABM strategy from scratch is no easy task.

According to [IDG](#), 36% of surveyed marketers identify account prioritization as their primary obstacle, while 35% consider the development and attainment of targeted account lists to be a significant hurdle.

Add to that [tight budgets](#), where 37% of marketers find it challenging to get an adequate budget and resources dedicated to account-based initiatives — and building an ABM program can become a time consuming and overwhelming task.

The good news? ABM has rapidly evolved in the decades since its advent. The first wave brought abundant data and the marketing technology revolution to propel ABM. The second brought an ecosystem of new ABM solutions.

Now marketers use AI to simplify ABM and drive better results more efficiently. Implementing an ABM strategy can be fast, easy and actionable. All it takes is commitment, careful planning, and the right partners.

In this guide, you'll learn:

- Common ABM obstacles, plus the challenges no one talks about
- Role of buyer intent data in ABM
- Tips for laying the groundwork
- Basics for building multi-channel ABM campaigns
- How to activate easy and actionable ABM



ABM is a long-term strategy focusing on accounts, not users

ABM is a unified B2B marketing strategy that includes:

1. Targeting accounts
2. Multithreading and engaging with the multiple buyers within those accounts
3. Measuring and refining messaging, content, and campaigns over time

Each broad activity comes with its own set of tasks, which we'll go into later. At a high-level, you segment your different accounts and audiences (personas), create messaging for each, and then decide channels and tactics to engage them all. And of course, you measure and refine channels, tactics, and messages as you go.

ABM is just good B2B marketing.

It's simply a foundational B2B marketing strategy — built in collaboration with sales - to win and grow sales from companies with multiple decision-makers.

ABM isn't always slow, expensive, or hard to execute.

It certainly can be. But more than a bench of experienced growth marketers and a marketing tech stack of expensive, complex ABM tools, pursuing an ABM strategy requires commitment.

Executive support is crucial for success.

With the right executive support commitment, you and your team can overcome common ABM challenges, as well as the ones no one likes to discuss.

Is your B2B company ready to grow with ABM?

If you can check at least three, you can benefit from ABM.

✓ Strong understanding of customers	✓ High customer lifetime value
✓ Access to data sources to choose accounts	✓ Customer account expansion as an important source of new revenue
✓ Ability to invest in a marketing attribution tool	✓ Long and complex sales cycles
✓ Buying committees with multiple stakeholders	✓ Executive leadership support
✓ Marketing tech stack with marketing automation and customer relationship management (CRM)	

02.

Spoken and unspoken challenges of ABM



Top ABM challenges

1. Sales alignment

The truth is, even if you and sales don't 100% agree on an ABM strategy or on the accounts to target, nothing stops marketing from doing a pilot test. Starting small by selecting some accounts and winning is powerful proof that could earn a joint pilot.



We want one common process, set of data and KPIs. The result is an essential shared language that both marketing and sales teams can use more effectively to communicate what's working and what's not."

Pat Eskew
Chief Revenue Officer



iManage

[Read more](#)



Even when there is buy-in and alignment with sales, it can be hard to agree on accounts, the "right" tiers, and the "right" resources. And of course, part of the resource investment includes a dedicated marketer working very closely with a dedicated sales team or business development representative (BDR) along with campaigns.

2. Deploying ABM at scale

Targeting individual accounts with [personalized content and campaigns](#) is a big task. However, there are marketing tools for [quickly creating custom content](#), [landing pages](#), and [ads](#).

3. Shared understanding of data

It can be hard for sales to resist jumping on an account as a lead, instead of letting the engagement process work as intended. Marketing and sales should work together, so everyone understands what makes an account marketing and sales-qualified.



ABM challenges they don't tell you about

ABM is a strategy. It's NOT your next martech silver bullet for getting new accounts and revenue. If there's anything you learn from this eBook, it's that you should avoid the temptation of buying a tool to "do ABM" before you design your game plan.

Your ABM strategy should guide your selection strategy to develop accurate ABM solution requirements.

By diving straight into tool and data selection, you risk investing in the wrong ones at best, overbuying for your goals, and sabotaging your entire ABM program at worst.



All-in-one, native ABM tools are feature-rich, with an integrated suite of functions across the ABM lifecycle.

They include functions like account identification, buyer intent data, ad networks, and data enrichment. They're feature and function-rich, sometimes with more functionality than you'll ever use. For this reason, know your goals!

Finding and fueling the right ABM stack can be tied to how you want to reach accounts:

- Do you require a tool to help you choose accounts to target?
- Do you want that function to be in a separate tool or should it be integrated into a native platform?
- If you're planning retargeting ads, should this be integrated or a stand-alone tool?

Choosing the right solutions for your ABM program is part of resource alignment decisions.

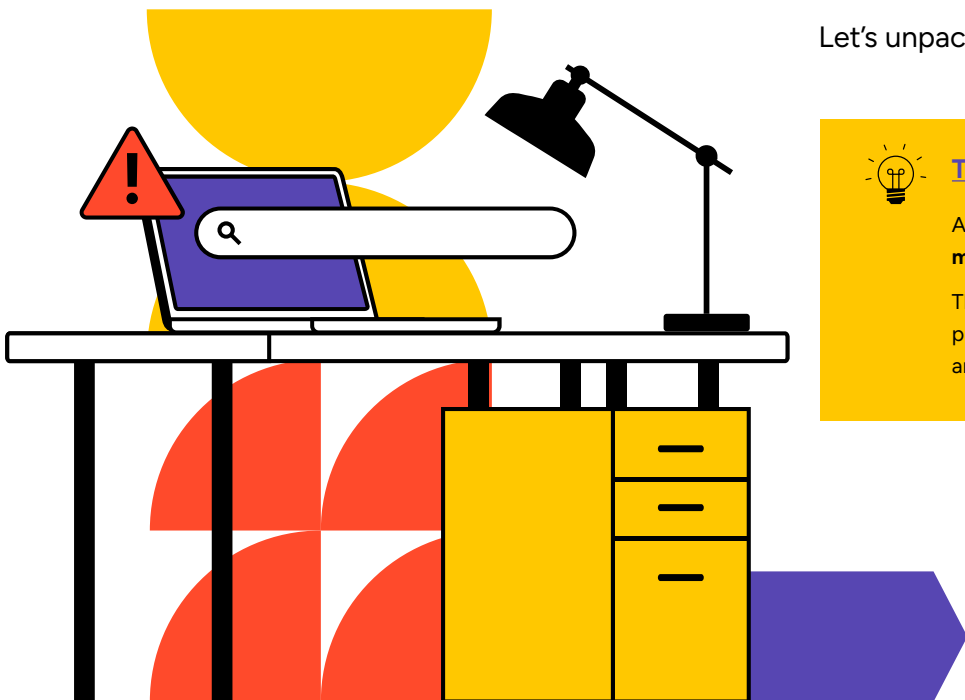
Some ABM solutions can quickly work with your existing infrastructure, while others require some lengthy integration into your stack and into your processes. This is especially true of the all-in-one, or native ABM solutions.

Native ABM tools are far from perfect

Besides high cost and complexity, native ABM tools that operate by mostly using web searches present some real challenges.

- Ad networks can suffer from attribution issues and ad fraud problems.
- Data processing of web search data can take days to identify website visitors, making it slow for you to take action.
- Inferred intent from web search data isn't always accurate, which leads to what ABM is supposed to prevent — wasted time, effort, and resources on accounts with no intention to buy your product.

Let's unpack these challenges, one by one.



The 95:5 Rule and its implications

According to the Ehrenberg-Bass Institute, **up to 95% of people or firms are not in the market for many goods and services at any one time.**

The big question becomes: How do you efficiently find the 5% of people or firms actively buying your product at any given time? Especially when, as the institute says, "advertising mostly hits people who are not going to buy your product anytime soon."



Web search keywords lead to questionable intent

So, how do ABM solutions that are based on web search data work?

Let's say that over a day or two, multiple employees at Target Account One search the web or specific sections within company websites. All of this data takes up to 48 hours to process and characterize as a shopper and match to an account.

And then you have to ask yourself about whether a search using a keyword in that pile of web search data really translates to intent to buy?

Let's assume your company sells security software to IT departments. The keyword search is "security" and BigCo comes up as an actively searching prospect. How do you know that security means "IT security" and not "physical security" or "endpoint security" or "emotional security"?

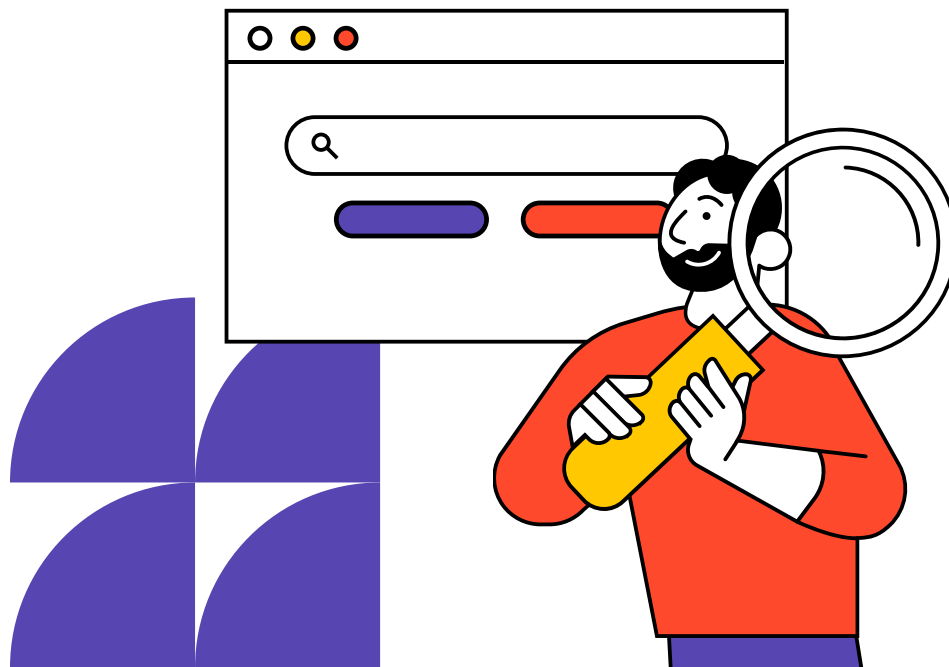


G2 uniquely surfaces the 5% of buyers who are in-market at any given time.

Since the iron law of demand generation or growth marketing is to get the first meeting at the lowest cost, how is this efficient when you're not really sure the intent hits the right "security" target?

Finally, what really constitutes in-market? ABM tools that infer intent using the wider net of web search data are certain to have a more generous definition than what your team defines as a marketing qualified lead (MQL).

But these aren't the only potential pitfalls, either.





Other potential challenges

Digital ad fraud is a pervasive problem of the modern age.

Ad display networks in some native ABM platforms may come with these familiar problems. The impact? A drained budget.

Your ABM solution vendor's attribution models are not the same as yours.

The reason is simple: their interests are not the same as yours. They'll use more liberal attribution because their main interest is meeting contractual requirements. Meanwhile, yours is getting sales qualified leads from your target accounts.

Time delays make reaching prospects less timely.

ABM tools can take a day or two to process web search data for intent signals. Search data needs to go from the source data owner (like the service provider or search engine company), and the signals need to be processed using algorithms. This delay slows your team, too.

Web search data alone does not necessarily imply purchase intention.

The internet is a big place, and people search for all kinds of reasons, giving rise to a weak and erroneous intent to buy.

This all brings us to our next section on understanding the role of intent data in ABM.

03.

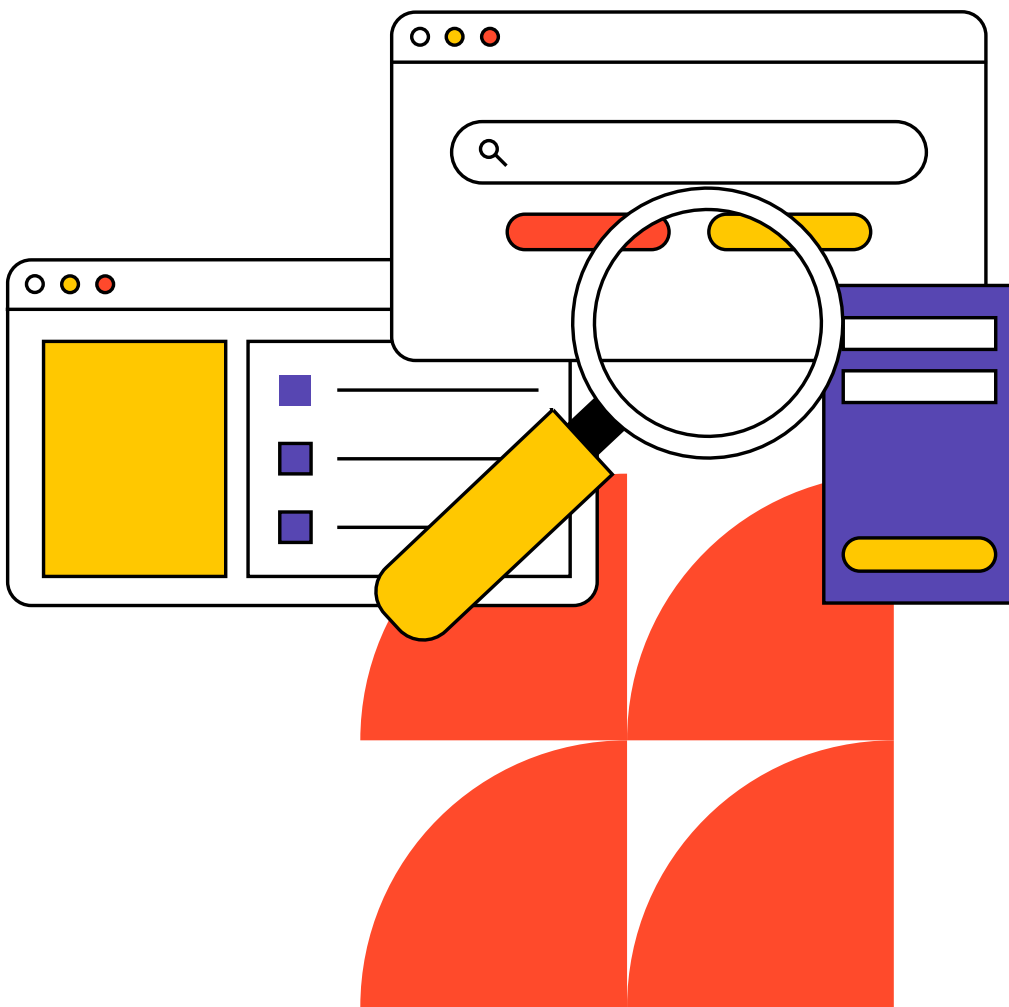
Role of intent data in ABM





Understand intent data to evaluate ABM tools

ABM is built around a simple concept: that you should market in a personal way to those who visit your website, or who are searching other related websites, or the Internet, looking for solutions like yours.



Intent data is generated by searches, website visits, and the page type visited.

Every time a prospect hits your website, competitor site, or searches the web for your product category, it generates machine data that is known as an “intent signal.”

The more someone interacts with your site or searches your product category, and the more this happens throughout an organization, the more likely it is that an account is “in-market.” This means that where a targeted account searches, how often (frequency), and how much time they spend (dwell time) are all key to accurately identifying a targeted account as in-market.

As volume and type of search increase, so does inferred interest.

When people search different competitors, while they’re concurrently looking at you, those intent signals from that account become stronger and stronger. To classify accounts, models use intent data to make inferences as to buying journey stage – awareness, consideration, and actively in decision-making mode.

Thanks to AI, ABM tools use proprietary algorithms. Like all tools that use machine learning, algorithms are constantly refined, improving intent models over time.



Different data sources power different ABM solutions

Prospects consume information across channels. Each interaction produces its own machine data, giving rise to different source data that powers models. Thus, the source data driving an intent model — where a targeted account searches — is the ultimate source of its pros and cons. So now, ask yourself: where is the best place to find that 5% who is a more reliable buyer?

INTENT DATA	FIRST PARTY	SECOND PARTY	THIRD PARTY
Source Data	Collected about customers and prospects, and their interactions with your website, social, and email channels (via any tools you use)	Someone else's first-party data, usually collected by publication networks and review sites	Web search data, video, ad, apps, publication networks, analyst, and data cooperatives from a set of IP addresses
Strengths	- You own it - No privacy concerns	- Depending on source, can indicate strong intent across funnel - Observed activity - Enables faster action - Easier to prove ROI	- High quantity of a broad set of intent signals from public data sources - More top-of-funnel buying intent predictor - Account-level data
Weaknesses	Limited to interactions with your channels	- Some second-party sources can't reliably detect top-of-funnel activity - Usefulness highly dependent on source	- Captures only those who are aware of your product - Noisy data, so it's less reliable - Longer and slower process to maximize investment - Harder to prove ROI



How to operationalize intent data into workflows and processes

Buyer intent data that identifies target accounts is a real-time, ongoing flow of data for ABM campaign execution. To quickly and easily act on the identified target accounts, you can view them in the intent data vendor's native console or download a CSV file to import into marketing infrastructure.



First, we optimized our paid media channels to pipeline, not just leads or MQLs. That helped us, but it didn't get us to our goal ... We started to look at intent data to figure out what intent fits at what point in the funnel, and what channel plays a part."

Whitney Donaldson
Global Head of Demand Gen



[Read more](#)



In the spirit of making ABM easy and actionable, it's also relatively quick to use existing integrations to operationalize buyer intent data into marketing and sales. Within minutes, buyer intent data can flow into nearly any ad platform, as well as marketing and sales technology your teams use every day.

You can directly [integrate buyer intent data](#) flows of target accounts to:

- Marketing automation tools
- Customer relationship management (CRM) software
- Native ABM tools
- Sales engagement and sales intelligence platforms
- Advertising platforms

Your buyer intent data vendor for ABM campaigns should be flexible enough to work into existing marketing and sales infrastructure. If you use a data lake or customer data platform to centralize all customer data, you should simply show the path, and your buyer intent data partner should show you how to get it there.



Intent data activity shows the buying stage and urgency to purchase

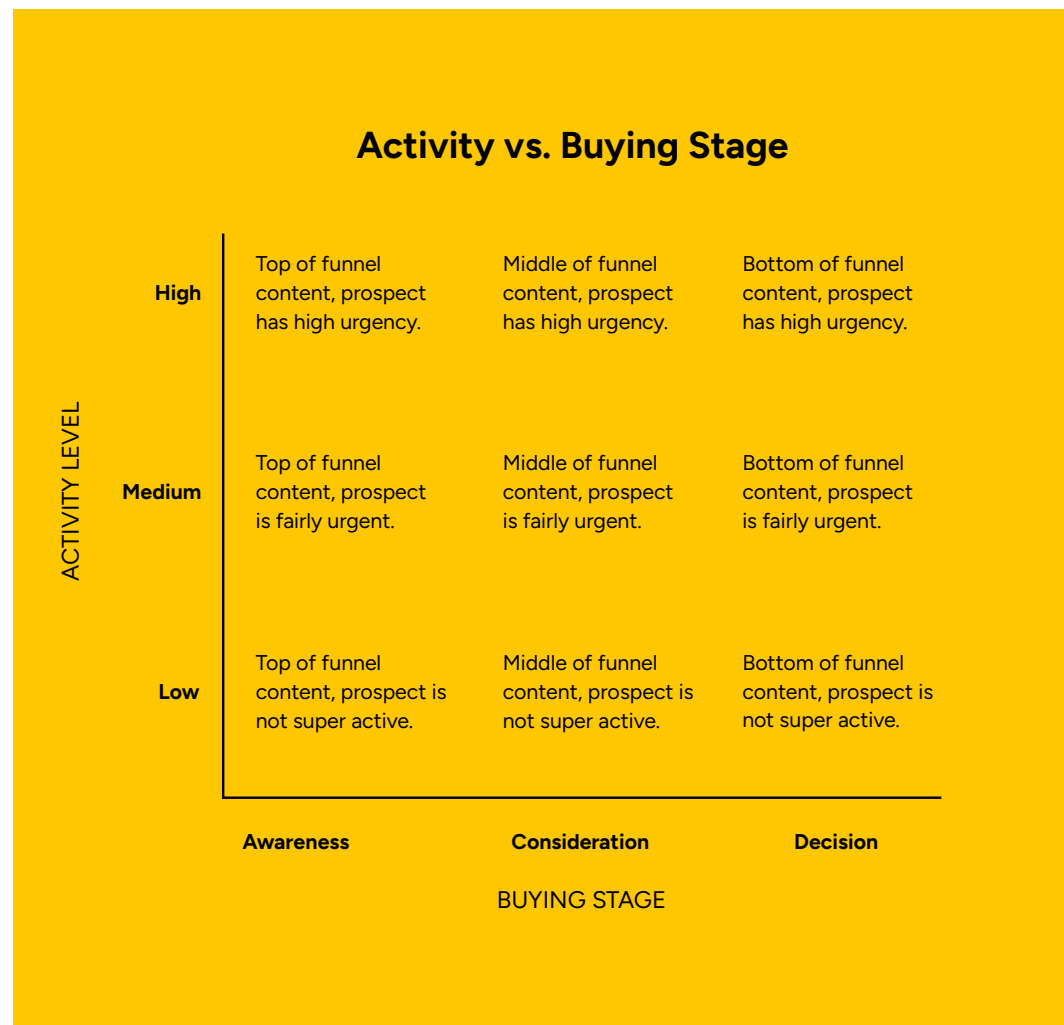
The more an account spends time searching and researching product options, the closer the account is to purchase.

And this is especially true in second-party data from review sites, where it's easier to accurately infer interest and intent.

Why? Consider that review sites are organized by a named product category, which establishes a strong logical relationship between activity and intent. Intent derived from much broader web search data alone lacks that strong logical relationship.

On review sites, the speed, volume, and frequency at which a searching shopper consumes content types across the funnel uniquely indicate purchase urgency.

Because active buyers interact with different areas within product categories and product profiles depending on their goals, a strong intent algorithm can determine the buying stage.





Page activity creates intent signals that tie to the buying stage

Based on how an account is interacting, generated intent signals indicate the buying stage in the following way:

Awareness stage activity is most tied to Category signals. These intent signals are generated when people research your overall product categories. They are still researching options, but they recognize there's a problem to solve.

Consideration stage activity is most tied to three different kinds of signals. First, there are Profile signals, which are generated when people directly research your product profile. Second, Pricing signals are generated when people research your pricing. Third, Alternatives signals are generated when people look for alternatives to your competitor.

Decision stage activity is most tied to Comparison signals. These buyer intent signals are generated when people directly compare your product and a competitive product.



When using intent data from review sites for ABM, the review site itself matters.

Scale, size, and reach matter. A lot.

The better a review site's search engine optimization, it will have more:

- Product categories
- Reviews on its site
- Researching shoppers

All work together to create the most accurate and actionable intent data of accounts that are truly in-market.

04.

Laying the groundwork for ABM





Start by defining goals and resources

Like any other marketing strategy you create, it starts with the basics.

The VERY first step is to set goals with sales.

What are your new revenue goals? Does your company need to accelerate sales? What about sales intelligence? What about customer upsell, churn reduction, and customer retention?

Next, take stock of your resources.

What is the budget? How is it split between people, technology, and third-party costs? What skills do you have? What tools make up the marketing tech stack? What content/marketing assets can you use? How large is the sales team?

Rule of thumb: If you're unsure of the resource level to get started, dedicate at least 10% and up to about the annual average of around 30% of your budget.

11%

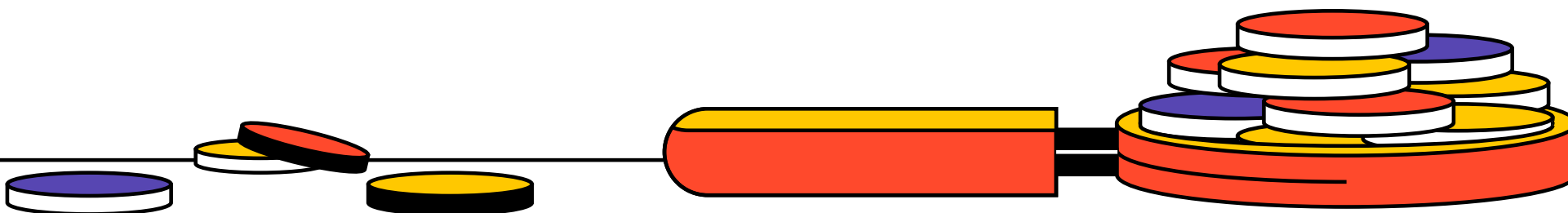
amount of budget companies allocate for ABM campaigns.

Source: [Momentum ITSMA](#)

3%

percentage of ABM MQLs that make up total MQLs.

Source: [HockeyStack](#)





Create segments from your universe of accounts

To define target accounts, you first need to understand the universe of accounts, or your total addressable market (TAM), assuming you had a 100% share of it.

Next, out of that universe of accounts, you create market segments. And, of course, again, how you segment the market depends on your product. You'll also need customer information to help create them.

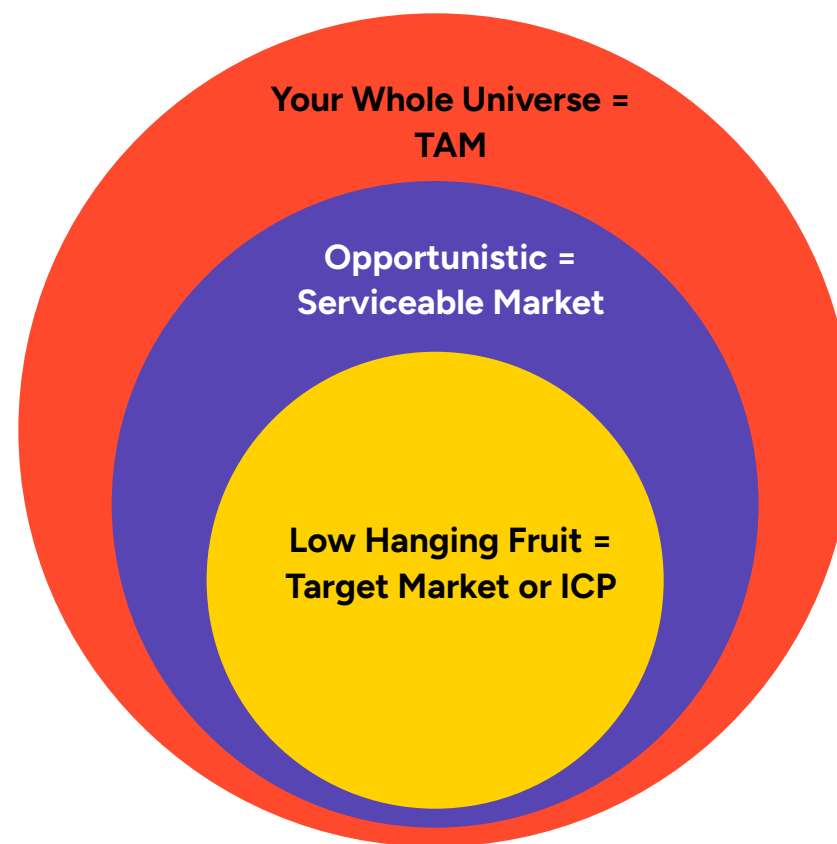
Time for an example. Say you sell HR software to the entire education vertical. This represents your whole market universe. Your segments are public school systems, community colleges, and private and public universities.

Armed with segments, you next determine which are high value.

Determining high-value requires research and analysis to include:

- Best product-market fit
- Highest revenue contribution
- Highest profit margin
- Current relationship
- Sales cycle duration

The segment(s) that emerge as most high value are your ideal customer profile (ICP).





How do you create segments?

There are four broad types of segmentation:

- **Geographic:** prospects within a defined territory; a data source example is a list of all companies in New York City.
- **Demographic:** prospects who cluster by shared size, industry, or economic characteristics; data source example is Fortune 500 of the largest U.S. corporations, ranked by 2022 revenue of at least \$7.2 billion.
- **Behavioral:** prospects who cluster by what they do, like technology they have, how much they consume a product or service, how they respond to your marketing. Data comes from internal sources, includes things like marketing automation, CRM, purchase, and revenue or consumption data.
- **Value-based:** attitudes, challenges, pain points, and other characteristics; data source is generally primary research, but marketing automation or intent data may help, too.

Your segmentation method to pursue depends on the data sources you have and those you can afford.

A customer base analysis helps identify high-value customers, and you use demographic and behavioral characteristics to see how they cluster. You can easily accomplish this task with your usage or sales data, coupled with a small investment in third-party data for enrichment. Conversations with sales, customer success, or even customers themselves will help you learn more.

The important point here: **use your own customer base to inform segmentation, and then when drawing up your account list, the task is to find MORE prospects like your best customers.**

With no budget or time resources, the “conference table” method can work, too. This is where you huddle with your sales and customer success colleagues to discuss high value customers and place them into groups.



Useful data sources

- Customer demographics
- Sales or service usage data
- CRM data
- Marketing automation data
- Third-party
- Primary research
- Win-loss research

How do you complete a segmentation development project?

The most successful segmentation projects are supported by, and sometimes involve, executive marketing and sales leadership.

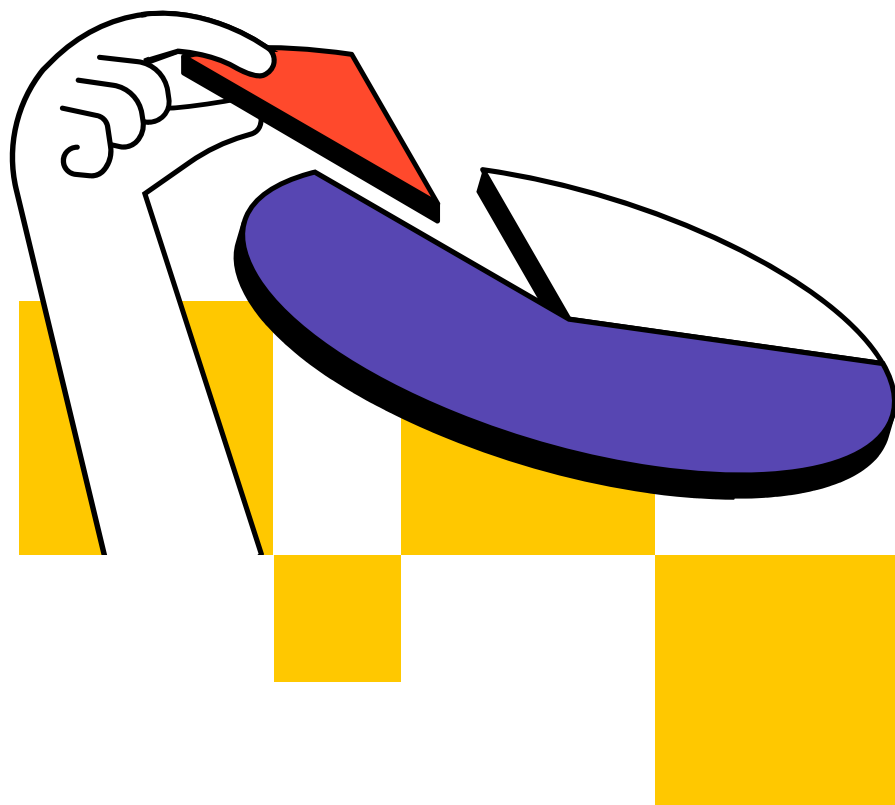
Aside from their support in executing on segments, there are a few reasons why executive leadership is necessary:

1. **Sensitive data.** These projects can involve some of your company's most important or proprietary data.
2. **Data outside marketing control.** You'll likely need to involve your data team, if there is one, or finance, operations, and/or IT.
3. **Data analysis skills.** You'll likely need to merge multiple data sources, so you'll need the skills to do that and the analytical judgment to arrive at the right results. If your marketing teams don't have the analytical chops for the task, consider using an experienced agency or external consultant.



Segmentation at a glance

- Company size
- Industry
- Tech stack
- Size of team using product
- Funding rounds
- Goal or pain point to solve
- Important features or functions





Example 1: Demographic segments created using internal and third-party data sources

SEGMENT based on number of employees	BUYING CRITERIA	KEY DECISION MAKERS	INFLUENCERS & PERSONAS	CHARACTERISTICS	TRIAL
1000 – 5,000	Ease of use and set up by admin Replaces outdated product Customer and partner portals Complex policy management Log analysis Troubleshooting	CIO Senior network management	CFO	Regional companies Regional travel and remote offices Likely to outsource	Free 30-day trial
5,000 – 10,000	Ease of use and set up by global admin Multicenter, on-prem and cloud Compliance auditing Log analysis High performance and scalability Customer and partner portals	CIO Senior network management	CFO Legal Maybe a trusted third- party advisor	Regional companies Regional travel and remote offices Likely to outsource	Will pay for customized pilot
10,000 +	Same as above	CFO Multiple CIOs Buying committee of Sr. networking and security pros	Systems integrators and consultants Integration partners	Global companies and worldwide travel Likely to outsource	Will pay for customized pilot



Example 2: Segments based on behavior created using internal usage data

SEGMENT by consumption	MEDIAN MONTHLY INVOICE	MEDIAN MONTHLY PEAK USERS	INDUSTRY	ORGANIZATION	% REMOTE	MEDIAN NUMBER OF EMPLOYEES	MEDIAN REVENUE PER EMPLOYEE (Millions \$)
Power Users Top 20%	\$21,095	2,440	35% Manufacturing 24% Business Services 14% Healthcare 10.3% Retail 7% Transportation 7% Tech	48% Public 21% private 17% subsidiaries 11% non-profit	52%	10,597	0.578
Middle Kids	\$4,275	150	38% Manufacturing 14% Financial 10.4% Holding company 7% Transportation	45% Public 24% private 21% subsidiary 7% non-profit	28%	16,929	0.304
Casual Users Bottom 20%	\$608	60	36% Manufacturing 11.2% Holding Company 11% Financial 10.7% Business Services 1% Healthcare 3.5% Retail	11% Public 60% private 25% subsidiaries 4% non-profit	14%	525	0.291



Within your ICP, name your set of accounts

You then prioritize accounts according to how well they match your ICP. To do this, you consider:

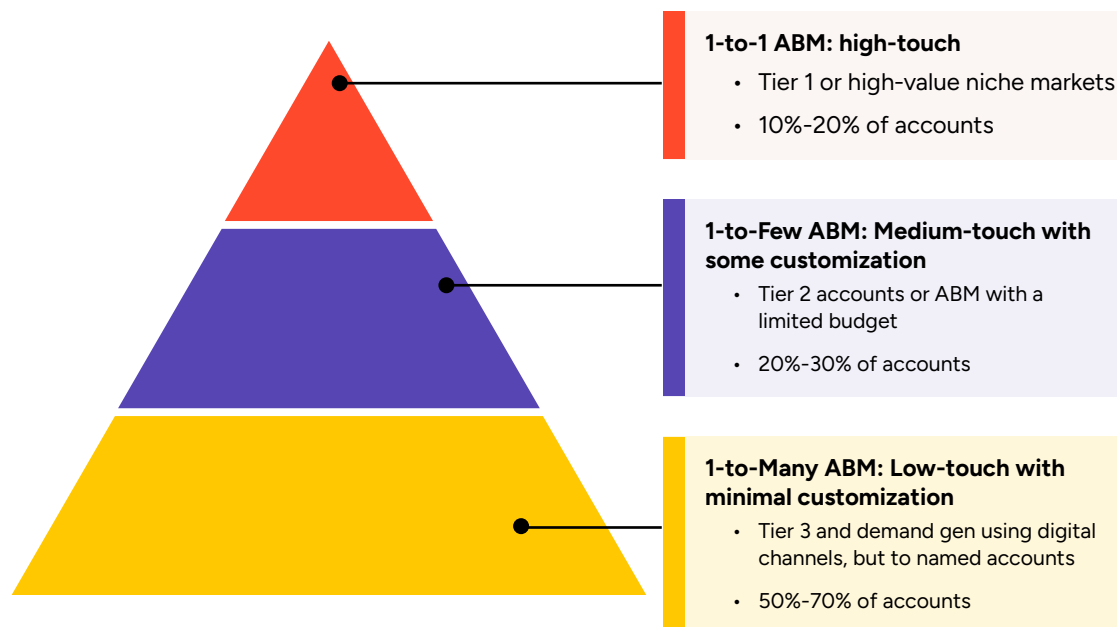
- Corporate demographics
- Product or service fit
- Revenue potential or average deal size
- Sales cycle length
- Depth of current relationship
- Sales or BDR team size

You may also want to add a company's:

- Technology usage
- Market size or niche size
- ABM-related marketing budget
- Revenue potential/average deal size
- Channel or other buying behavior
- Current customer references your ICP may value

Once done, place them into account tiers. The top tier, making up about 10-20% of accounts, best matches your ICP. The mid-tier, about 20-30% of accounts, has many of the ICP characteristics. The bottom tier, 50-70% of accounts, has some of them.

Unfortunately, there's no magical rule as to the absolute numbers. The key thing is to make sure your sales team is large enough to adequately support the number of accounts — so be realistic on the number of sales hours it will take per account type.





There are multiple ways for marketers to approach ABM

Just as there's no magic formula for the number of accounts and tiers, there isn't a rule for which type of ABM to pursue.

“Layering all of your different types of data is crucial to run the most efficient campaigns — whether you're working with first, second, or third-party data like G2's buyer intent.”

Michael Pannone
Director of Demand Generation



[Read more](#)



Single and blended strategies

Some companies deploy only a 1:1 approach, and others follow a blended strategy and create engagement strategies and tactics targeted specifically for each tier.

Full-funnel strategy

Some pursue a full-funnel approach, tying campaigns to the funnel stage – and concurrently running them at all three levels. To drive awareness to new accounts, you can use a 1:Many strategy. Then, to drive consideration and foster engagement, use a 1:Few approach. At the lower end of the funnel, you can accelerate the opportunity using a 1:1 approach.

This approach helps engage the right person at the right time, as well as best focuses resources to drive and convert quality inbound leads.



So, how do others create account tiers?

EXAMPLE 1

Large systems integrator with an average deal size of \$150 million.

Selling only to the Fortune 50, use a 1:1 ABM strategy in a single tier, with each account getting highly personalized marketing. In this case, you'll only use 1:1 ABM, which is the highest level of personalization.

EXAMPLE 2

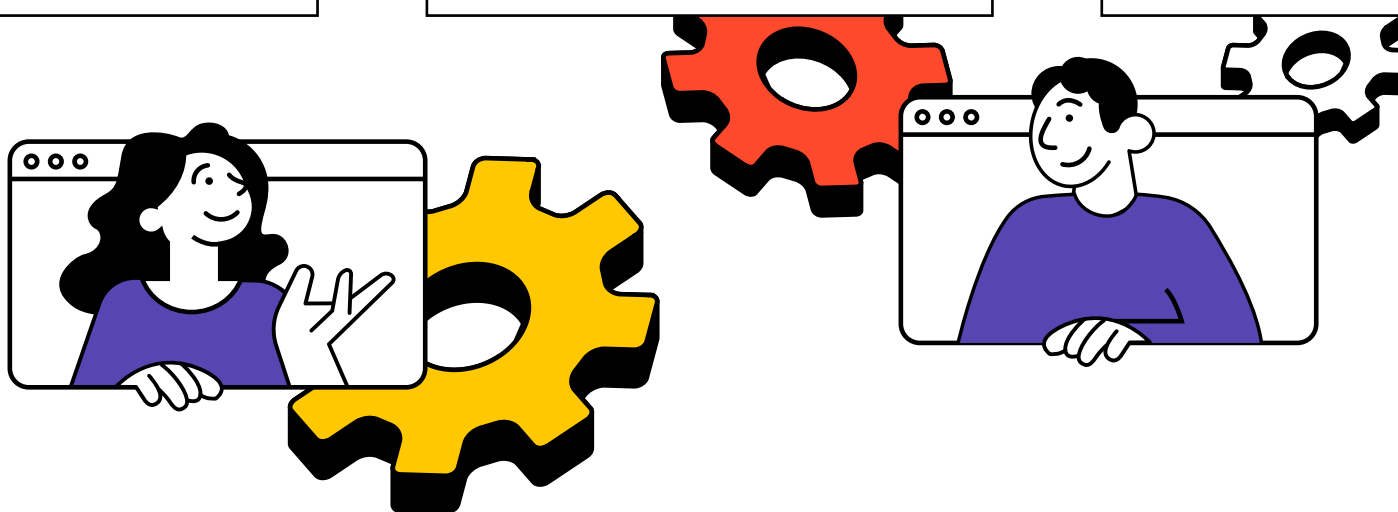
Large hardware vendor with an average deal size of \$25 million.

Selling only to the Global 1000, they use a blended strategy. The top-tier accounts are 5% of their total ICP, or 100 accounts, that get 1:1 focus. Then for the mid-tier, 20%, or 400 accounts, get a 1:Few approach, and the remaining 500 accounts get the 1:Many tactics.

EXAMPLE 3

SaaS vendor with an average annual deal size of \$80,000.

Selling to companies with more than 100 employees that use Microsoft 365, they use a blended strategy. They use two account tiers, following the 1:Few approach for the top 200 accounts. The second tier of about 400 accounts get the 1:Many ABM approach.





How to measure and optimize your ABM strategy and tactics

Anticipating how you'll track the success of your ABM campaigns is the final step in laying the ABM groundwork.

Just as you use metrics to manage your demand gen program now, you'll need to include those same metrics by:

- Account for 1:1 ABM
- Tier for 1:Few ABM and 1:Many ABM

Together, these metrics produce the insights you need to refine strategies, messaging, target account lists, and personas to continuously improve results.

BUYING STAGE	GOAL	KPIs	ADDITIONAL ABM KPIs
Awareness	Increase visibility and share of voice	• Impressions • Reach/traffic • Direct/organic traffic • Click-through rate (CTR) • Cost per click (CPC) • Cost per result (CPR)	Marketing Influenced Acquisition per tier (or account if 1:1 ABM approach to a relatively small set of accounts) Marketing influenced expansion of buying committee measured by growth in marketing automation records per account
Consideration	Build deeper engagement that fosters a relationship	• Website engagement • Video views • Ad engagement • Engagement level • Cost per result (CPR) • Conversions	Engagement of growth in buying committee Growth in marketing touchpoints at account level within a given time frame
Decision	Provide differentiation to lead to a purchasing decision	• Website conversions • Marketing qualified lead (MQL) • MQL > sales qualified opportunity • (Cost per lead) • Cost per result (CPR) • Time to revenue • Return on investment	Revenue generated per account Marketing influenced account expansion



Which sales and marketing metrics to track?

ABM tier/account revenue contribution		$\frac{\text{REVENUE PER TIER OR ACCOUNT}}{\text{TOTAL REVENUE}}$
Win rate per ABM tier/account		$\frac{\text{TOTAL NEW SALES}}{\text{TOTAL SALES IN ABM TIER OR ACCOUNT}}$
Sales cycle length per tier/account		$\frac{\text{TOTAL SALES DAYS}}{\text{TOTAL NUMBER OF CLOSED SALES}}$
Customer acquisition cost (CAC) per tier/account		$\frac{\text{SALES COSTS + MARKETING COSTS PER INTERVAL}}{\text{NUMBER OF NEW CUSTOMERS PER INTERVAL}}$
Sales conversion rates per tier/account		$\frac{(\text{N. LEADS CONVERTED INTO SALES OR QUALIFIED LEADS})}{\text{N. OPPORTUNITIES FROM CHANNEL}} \times 100$
Channel contribution per tier/account		$\frac{\text{N. OPPORTUNITIES FROM CHANNEL}}{\text{TOTAL OPPORTUNITIES IN PIPELINE}}$
Customer acquisition growth rate per tier/account		$\frac{\text{N. ADDITIONAL NEW CUSTOMERS IN INTERVAL}}{\text{TOTAL CUSTOMERS IN INTERVAL}} \times 100$



Marketing automation and CRMs are necessary for measuring and optimizing ABM

To measure and optimize ABM's multi-channel campaigns, and before adding any ABM-related solutions, you need to have a few marketing technologies in your stack.

At minimum, you need:

- AI-powered marketing automation
- Customer relationship management (CRM)

While not a barrier to getting started, investing in a good attribution tool is strongly recommended and makes planning and optimizing far more efficient, accurate, and easy.

Let's start with how you can leverage AI in your ABM programs.





Accelerate ABM success with AI

The manual processes of traditional ABM can be time-consuming and challenging to scale.

However, artificial intelligence (AI) helps demand generation teams execute ABM strategies with more efficiency and precision.

Let's explore how AI can revolutionize your ABM efforts, from creating hyper-personalized campaigns to optimizing attribution and automating crucial workflows, ultimately driving more revenue growth and stronger ROI.

4x

AI-assisted video and multimedia content will see a 4x increase in adoption.

Source: [AI Marketing Mind Report](#)

50%

AI-driven personalization will drive a 50% increase in B2B buyer engagement.

Source: [AI Marketing Mind Report](#)

35%

AI-powered automation will reduce marketing operational costs by 35%.

Source: [AI Marketing Mind Report](#)



Create hyper-personalized campaigns

By analyzing a wealth of data, including behavioral signals, past interactions, and firmographic information,

AI can dynamically adjust campaign content, messaging, and outreach in real time.



Tips to implement

- Scale the use of conversational AI chatbots on your website.
- Implement AI tools with reasoning or sentiment analysis to refine chatbot responses.
- A/B test AI-driven interactions against human-led engagement to optimize messaging.
- Allocate approximately 30% of your content budget to AI conversational tools.

This level of personalization significantly reduces friction in the buyer journey, which is crucial for ABM success. In fact, AI-driven personalization can [boost engagement by up to 42%](#) and increase [sales growth by 10-15%](#).



Personalization is no longer just about creating content that resonates at the right time; it's also about meeting your customers where they wouldn't expect you."

Victoria Blackwell
Research Insights



[Read more](#)





AI in the attribution-first world

Understanding and proving the impact of marketing spend is a persistent challenge for demand generation teams.

A [recent report](#) indicates that 42% of those surveyed still rely on manual spreadsheet-based attribution, and 64% lack quantitative tools to demonstrate marketing's impact on company performance.

The good news is that AI-powered attribution solutions can not only eliminate manual attribution, but they also offer a more accurate and comprehensive view of the customer journey.

Integrating unique data sources like G2 with [AI-powered attribution solutions](#) like [Dreamdata](#), [Factors.ai](#), and [HockeyStack](#), for example, can help you gain a comprehensive understanding of your customer journeys and optimize marketing investments.



Tips to implement

- Explore AI-powered multi-touch attribution solutions.
- Integrate your marketing platforms (CRM, ad platforms, G2) with your chosen attribution tool.
- Utilize attribution data to identify high-performing channels and content.
- Leverage buyer intent data from platforms like G2 within your attribution tool to build targeted audiences.



Success story: Chameleon and Dreamdata

[Chameleon](#), a digital adoption platform focused on in-product experiences, recognized the need for better clarity in their marketing channel performance. And while they knew prospects found them through G2, quantifying impact was difficult, and multi-touch attribution efforts consumed significant engineering resources without providing a clear picture of the touchpoints between initial contact and conversion.

By leveraging [G2's API](#) to integrate with Dreamdata, Chameleon built custom audiences based on centralized data and synced them directly to LinkedIn and Google Ads using Dreamdata's Audience Hub.

Customer Journeys in Dreamdata allowed them to examine their ICP's activity and understand when and how G2 touch points occurred, and the Revenue Attribution Report in Dreamdata easily enabled them to quantify G2's overall impact on revenue.

[Read the full case study](#)

2x

increase in ROAS and a 50% reduction in CPA between Q1 and Q2 2024.

14%

of closed-won deals influenced by G2 activity.

33%

deals with G2 as a first touch closed 33% faster than average.



AI-driven workflow automation

By leveraging AI as a co-pilot, teams can also redirect time previously spent on manual tasks towards deeper customer engagement while simultaneously lowering overall costs.

In fact, economic predictions from PwC suggest that AI could contribute a staggering \$15.7 trillion to the global economy by 2030, a portion of which will be driven by increased productivity and cost reductions resulting from widespread AI adoption. An ongoing trend of martech consolidation, as companies seek integrated AI-driven platforms over fragmented solutions, further reinforces this shift.



Tips to implement

- Conduct a workflow audit to identify repetitive, manual marketing tasks.
- Select AI-powered automation tools that integrate with your existing martech stack.
- Develop a phased implementation roadmap for adopting AI automation.
- Educate your team on the benefits and best practices of using AI automation tools.

Want to learn more about AI for ABM?

Download our latest [AI Marketing Mind Report!](#)

05.

Building multi-channel ABM campaigns





Create your ABM campaigns and tactics

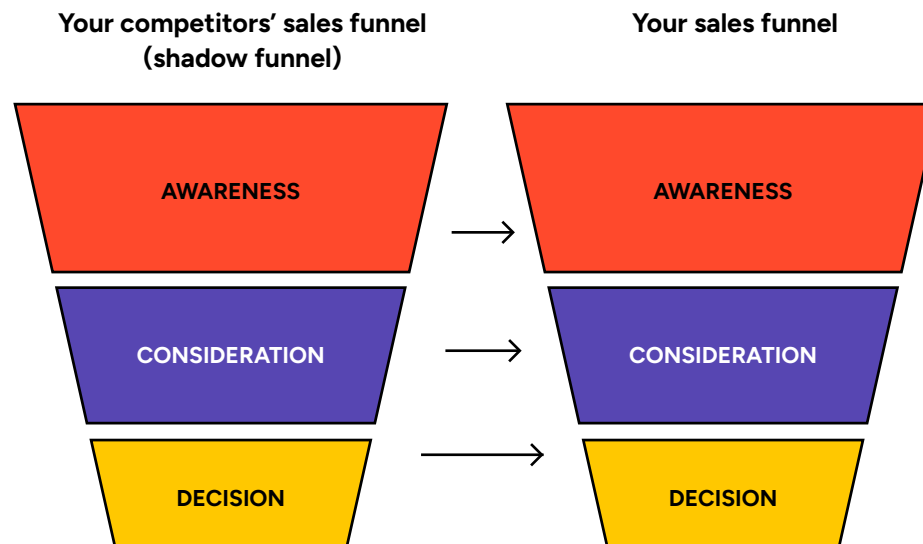
You've done a lot of hard work (hopefully less with the help of AI) to lay the groundwork for your ABM strategy. Once you've built your target account list, it's finally time to move to the next step — the campaign plan.

In this section, we'll go over how to:

- Build audiences from signals
- Craft messaging to a buying committee
- Complete your messaging map with key value messages by audience/persona
- Plan your content and channel mix per ABM account tier
- Why you should include review sites in your ABM channel mix

Building a shadow funnel

Use G2 Buyer Intent data to address your shadow funnel — the funnel of prospects showing engagement with your category or your competitors, but not you. Leverage G2 Buyer Intent to identify organizations in your shadow funnel and move them into your sales funnel.





Build audiences from signals

Traditional audience segmentation usually relies on static filters such as company size, industry, and job title. While these provide a foundational understanding of who to target, they can lead to crowded inboxes and generic outreach.

In contrast, signals provide real-time insights into when and why a prospect is likely to engage.

Signals also offer a distinct advantage by revealing hidden buyers — those actively in motion, experiencing pain points, and ready to take action even before a formal "Request a Demo". By surfacing these signals, you can engage with prospects at the right moment, with the right content.

AI can also help you identify and apply these signals so that you can automate the research and personalization needed for the most effective outreach.



Examples of signal-based audience building

G2 comparison insights

Monitoring G2 comparisons and reviews to identify prospects actively evaluating competitors, enabling precisely timed outreach.

Demo call data

Analyzing demo call recordings to surface key buyer signals such as mentions of leadership changes or budget shifts, allowing for proactive engagement.

Social listening

Utilizing social listening tools to track posts, comments, and brand mentions, uncovering buying signals, competitive shifts, and emerging needs.



Develop the right messaging in content assets

When developing your plan to engage accounts, it's important to remember influencers and decision-makers who compose your buying committee. While the account tier might have a specific pain point, each persona making up the buying committee will have a different set of interests.

Time for another example: let's say your company makes an automation tool. Accounts benefit by growing IT efficiency. The bigger the account, the more acute the pain. Messaging should address:

- Lower-level influencers feel the pain of boring, manual work
- Higher-level IT executives suffer from inefficient teams
- Finance executives have the pain of high IT labor costs
- Security teams suffer the consequences of human error due to no automation

Just as you customize marketing messages for each persona, you need to use more muscle if you're following a 1:1 ABM approach. In this case, you develop personalized campaign assets that resonate with each member of the buying committee.

3x YoY growth

in ICP deals using G2's Buyer Intent and Content Subscription

[Read the case study](#)

If you're following a blended strategy where higher tiers get greater personalization, then you could develop an individualized business case for the top tier. The lower tiers — where you follow a one-to-many approach — could get an eBook that explains how to create a business case, and give many examples depending on the size of the organization.



Use buyer intent signals for ABM messaging

Your prospects' intent signals tell you a lot about what they are looking for and what they need. Using these important intent signals, you can create messaging that resonates with your audience based on:

- Pages they visit
- Topics in the content they consume



Getting in front of the right accounts and being able to deliver relevant content has been crucial to these successes."

Eric Tonk
Director of Demand Generation

BetterCloud | [Read more](#)



You then need to translate that into targeted messaging for:

- Each persona type on the buying committee stakeholder. Both sales and marketing can create a hook for everyone in the buying committee.
- Competitive messaging. Use this when an account is viewing a product category page, a competitor's profile, or comparing your solution to your competitor.
- Prospect nurture outreach. Meet your prospect where they are in the buying journey, and guide them as they proceed.
- Customer upsell and [customer retention messaging](#). Use intent signals from customers who are searching new product categories or competitors. You'll know when they may be considering changing vendors, or adding a solution that you could sell them.



Complete your high-level product messaging map and define personas

Your high-level message should remain consistent for your product across personas. This high-level message then gets customized for personas. And if your top tiers have large buying committees, you may want to create personas by account tier.

HIGH-LEVEL MESSAGING SETUP FOR PRODUCT	HIGH-LEVEL PRODUCT POSITIONING	PERSONAS BY ACCOUNT TIER
• Urgent business or IT challenge customers needs to solve • How to solve the challenge • Only we can provide the solution because • Key Value Message 1 • Key Value Message 2 • Key Value Message 3 • Key differentiators	• Positioning statement • Elevator pitch: 25 word positioning statement • Company boilerplate • Headline or tagline (3-7 words)	• Job title • Role in buying process (influencer, champion, final decision-maker)



Complete this worksheet to develop your messaging

BUYING STAGE	PROSPECT GOAL	MARKETING GOAL	CONTENT ASSETS	INFLUENCER PERSONA ASSETS AND MESSAGES	FINAL DECISION MAKERS PERSONA ASSETS AND MESSAGES	CFO PERSONA ASSETS AND MESSAGES
Problem identification	Weigh and determine priorities	Increase visibility and share of voice	Guides and eBooks, original thought leadership research, customer stories, explainer videos, third-party reviews, ads			
Researching and requirements definition	Get buying committee stakeholder support	Build deeper engagement that fosters a relationship	Webinars, vendor events, product marketing, buyer guides, ROI calculators, third party-reviews, ads			
Decision-making	Evaluate and reaffirm	Provide differentiation to lead to a purchasing decision	Trials, demos, product guides, case studies, technical whitepapers, implementation services info, pricing, customer reviews and references			



Engage and nurture relationships with the right content assets on the right channel

You'll need to determine the channel mix to effectively reach target accounts and/or tiers. Instead of many smaller campaigns, you should create one cohesive, integrated campaign with consistent messaging across channels to maximize impact.

1:1 ABM CAMPAIGN TACTICS with high touch and complete personalization per account	1:FEW MEDIUM-TOUCH ABM TACTICS with some customization for groups of accounts that are similar in need and corporate demographics	1: MANY, LOW-TOUCH ABM TACTICS With little customization, so it resembles demand generation more
• One-on-one meetings • Executive in-person events like small dinners, workshops, innovation briefings • Content and thought leadership created for account • Webinars and virtual events for individual accounts • More lavish direct mail programs	• In-person vendor seminars • Webinars • Paid social media advertising • Content and thought leadership repurposed for groups of accounts • Email nurturing • Less expensive direct mail programs	• Email nurturing • Retargeting • Paid ads • Paid search • Webinars • Large customer and prospect conferences • Review site profiles



Include B2B review sites in your channel mix

Review sites — as a channel — are often overlooked by marketers. After all, millions of buyers use them to learn from objective user feedback based on actual experience with B2B products.

Think about it. The world's leading review site gets more than 80 million hits every year from technology buyers of all stripes. 100% of the Fortune 500 use it to discover new software and services. And for virtually any SaaS or software search, a buyer will see this site as one of the top organic positions on Google.



We tried other review sites, and G2's data and reach is, by far, the most effective, and much higher quality."

Colin Chang
Manager of Marketing Programs



[Read more](#)



The leading review site has the widest reach in the world. No other comes close. With [more than 3 million reviews](#) across more than 2100 B2B technology and software product categories, it's where buyers go to educate themselves throughout their buyer journey.

If a B2B marketing team wants to go where the buyers are, they'll include review sites as part of the ABM channel mix.



G2 Buyer Intent data

G2 utilizes a reverse IP search to identify the organizations that visit various pages on G2. We collect:

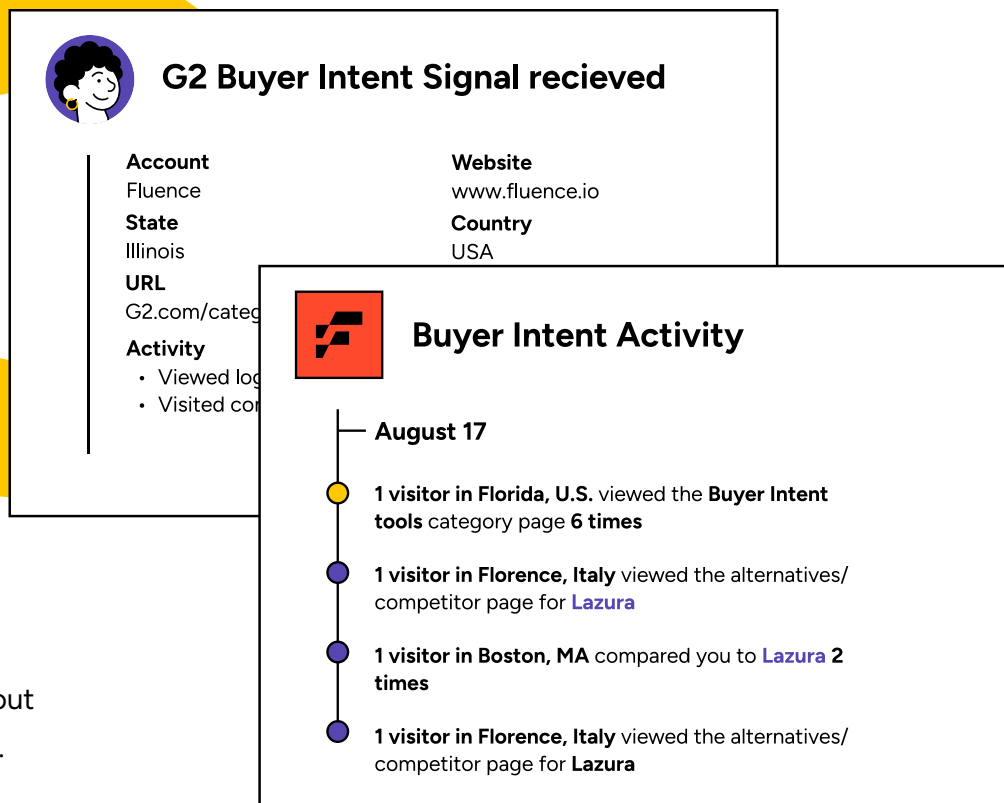
- Company name
- City, state, and country location
- Employees
- Sector
- Industry
- Sub-industry
- Number of unique buyers per company
- Profile page visits per company
- Category page visits per company
- Alternatives page visits per company
- Comparisons (including which vendors were compared) visits per company
- Content visits per company
- Sponsored content views per company

What is G2 Buyer Intent?

G2 Buyer Intent captures enriched data about buyers researching your product across G2.

Buyer intent signals are triggered by a variety of actions, including interacting with your product profile page, comparing your product to a competitor, or viewing alternatives to a product in a shared G2 product category.

This data enables your sales, marketing, and customer success teams to identify where an organization is on their buyer journey.



G2 Buyer Intent Signal received

Account
Fluence

State
Illinois

URL
G2.com/category

Activity

- Viewed log
- Visited com

Website
www.fluence.io

Country
USA

Buyer Intent Activity

August 17

- 1 visitor in Florida, U.S. viewed the **Buyer Intent tools** category page **6 times**
- 1 visitor in Florence, Italy viewed the alternatives/competitor page for **Lazura**
- 1 visitor in Boston, MA compared you to **Lazura** **2 times**
- 1 visitor in Florence, Italy viewed the alternatives/competitor page for **Lazura**



Use review sites to strengthen ABM initiatives

Marketing and sales teams both benefit from using B2B technology and software review sites, but in different ways. Marketing teams can:

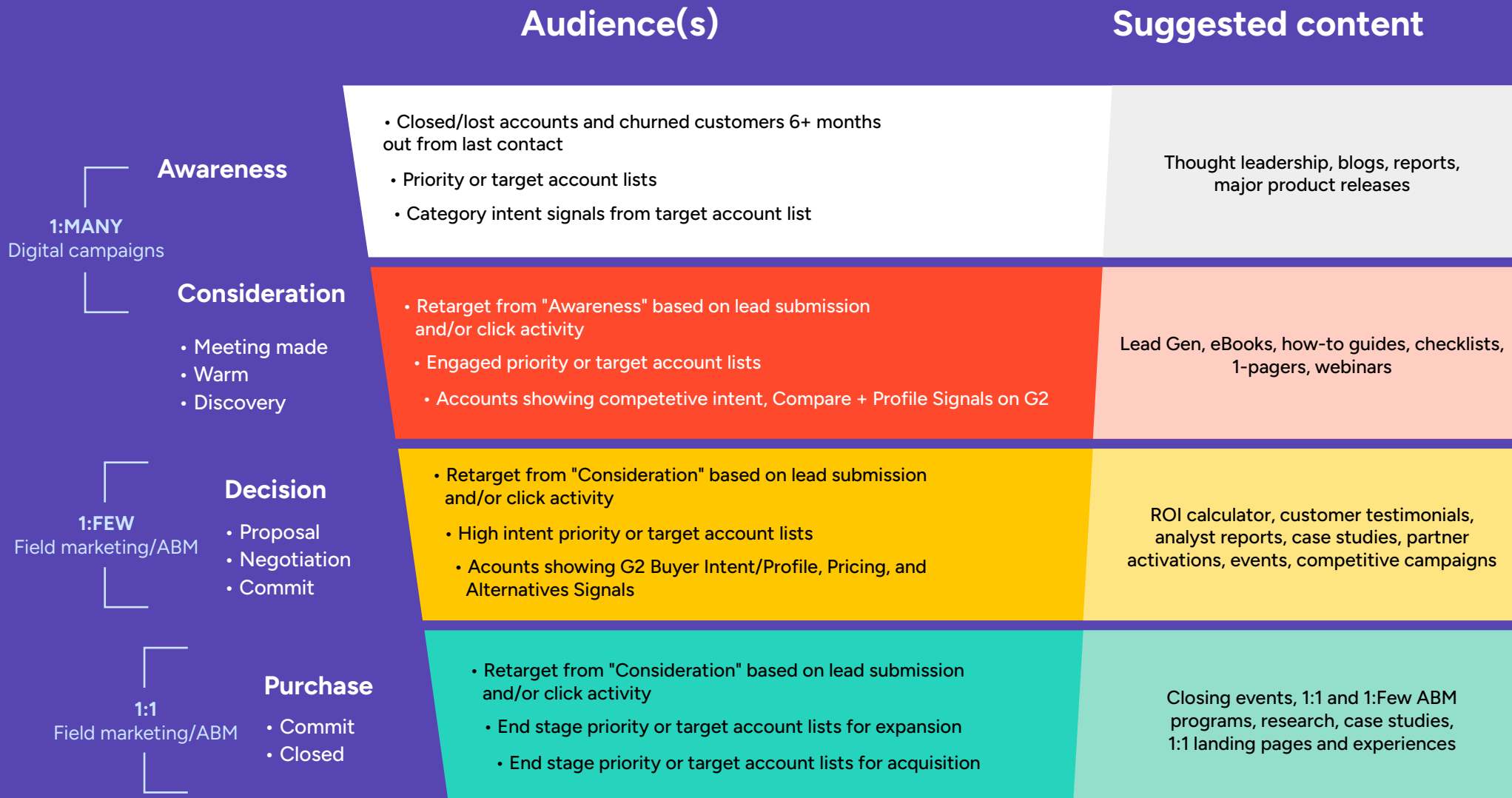
- Claim a profile for each product a B2B tech company has and work with brand teams to create a presence
- Build it out with additional content from content marketing, product marketing, and customer marketing
- Advertise sponsored content for helping digital advertising teams find new leads
- Use intent signals from target accounts for campaigns that develop [new demand and revenue](#), expand accounts, or reduce churn

The more a marketing team can drive interactions to all profiles across your entire product portfolio, the more they generate valuable intent signals for the entire company's ABM strategies. So, when devising your channel mix, smart B2B marketers include review sites. If your company has multiple products, make sure to encourage other product marketing teams to maximize the value of review sites.





Use G2 intent signals in a full-funnel ABM strategy





Sales can consistently meet or beat quotas using ABM with buyer intent

An ABM strategy that aligns marketing and sales on a set of accounts changes sales processes.



G2's Buyer Intent data helps sales teams drive a pipeline of warm, high-converting prospects

To improve sales processes, sales and BDR teams can integrate G2 Buyer Intent data into sales workflows with:

- [Slack](#) for immediate notification of target account activity
- [Salesforce](#), [HubSpot](#), or [Marketo](#) for account scoring, prioritization, and automated insights
- Sales engagement platforms for process management, like [Salesloft](#) and [Outreach](#)
- [Sales intelligence platforms for contact level data](#) from [ZoomInfo](#), [LinkedIn Sales Navigator](#), and more

The right set of ABM solutions, together with buyer intent data, can help sales teams:

- Project a high-value sales pipeline with more accuracy
- Access and apply important insights about target accounts
- Increase deal size/ACV and win rates
- Get meetings with ready-to-buy customers to get into deals before the competition
- Expand accounts
- Drive and close more opportunities to meet or beat quotes every quarter

The key, though, is buyer intent data that reveals the lowest funnel prospects at the time they're truly in market. This way, as soon as target accounts show interest, salespeople can quickly respond with the right message at the right time, using time and resources most efficiently.

06.

Activating ABM



The first key to easy and actionable ABM: A toolkit with simplicity

At this point, review your goals and resources. Do you need better quality leads? Faster speed to lead? Do you need a lower CPL? How much do you need to work with existing infrastructure? Do you need to deploy a new solution without a long integration period?

Of course you do. If you're like most demand gen or growth marketers, speed to lead is always top of mind (while cost per lead is second), so you need your ABM solution to be easy and actionable.

Then what exactly do we mean by simplicity in your ABM toolkit?



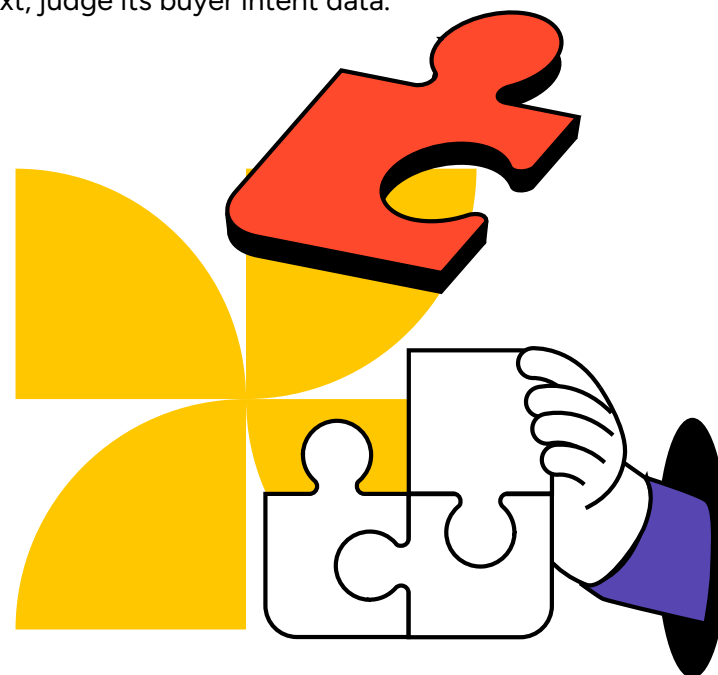
BetterCloud grew faster using G2 Buyer Intent to:

- Surface 98% of target accounts
- Find accounts with G2 intent signals that are 3.7x more likely to become an opportunity
- Increase open-to-closed won opportunities 36% faster
- Increase deal size by 81%

We're talking about ABM solutions with buyer intent that:

- Work easily with your existing marketing and sales infrastructure
- Are easy to learn
- Deploy quickly to works on Day 1 with no lengthy integration
- Integrate easily into existing marketing and sales processes
- Produce actionable analytics that enable fast decisions and actions
- Is cost-effective and able to provide a fast time to value
- Can prove its ROI

As you evaluate ABM solutions with buyer intent data, judge its complexity. Next, judge its buyer intent data.





The second key to easy and actionable ABM: Buyer intent data without the guesswork

Easy and actionable ABM includes using buyer intent data where there's a clear and strong logical relationship between a target account's web activity and being in-market — detecting that elusive 5%. B2B technology and software review sites deliver that strong relationship.



Essentially, we take all of this valuable data and leverage it to build in-market audience lists that inform our other advertising platforms such as LinkedIn.”

Kushal Shah
Marketing Operations Manager



After all, why else would someone spend a few hours researching product categories, reading product profiles, and digging deep into user reviews?

Thus, using buyer intent data from a software review site:

- Has real-time buyer intent data for instant sales and marketing action
- Offers unmatched accuracy with provable in-market buyers
- Enables teams to efficiently use time and money

Contrast that with third-party buyer intent data, like web searches. It's laden with ambiguity. Ambiguity means you'll likely overspend to advertise to reach a real buyer. And of course, inefficient ad spend undermines the value of third-party buyer intent data, and dampens any return on investment.



G2 is your partner for easy actionable ABM

Buyer [intent data](#) generated from reviews on G2 puts you on the fast path to achieve easy and actionable ABM with a fast speed to lead at a low cost per lead (CPL) because it truly measures accurate intent and identifies your ICP's target accounts.



My advice to anyone considering G2 Buyer Intent is: if you're a demand gen marketer, you have to get it. I couldn't ask for more."

Colin Chang
Manager of Marketing Programs



Only G2 can deliver [buyer intent data](#) derived from search and research behaviors of real employees. Employees at real companies who spend time learning from more than 3 million software and technology product reviews. Buyers conduct their research within defined product categories covering almost 2,000 technology and software products.

This means no ambiguity. No guessing intent.

Because G2 Buyer Intent delivers an identified account, and not personally identifiable information, there's never any worry about privacy violations. And thanks to [integrations with best-in-class sales intelligence tools](#), within minutes, your marketing and sales teams get real-time target account leads with up-contact information.

There's no wasted time and no wasted third-party marketing spend. Only [more leads and revenue](#) from targeted ABM accounts.



About G2

G2 is the world's largest and most trusted software marketplace. More than 90 million people — including employees at all Fortune 500 companies — use G2 annually to make smarter software decisions based on authentic peer reviews. Thousands of software and services companies of all sizes partner with G2 to build their reputation and grow their business, including Salesforce, HubSpot, Zoom, and Adobe.

To learn more about where you go for software, visit www.g2.com and follow us on [LinkedIn](#).

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