

# Boosting **Sales Pipeline Momentum** with Account-Based Reporting (ABR)

Big things happen when marketing and sales work together on target accounts.



# Programmatic B2B

Big things happen when marketing and sales work together on target accounts.

Collaboration between **B2B sales and marketing** teams is vital for successfully landing major accounts. Sales professionals bring deep customer insights and a nuanced understanding of prospect needs, while marketing experts possess the tools to create compelling narratives and generate brand awareness. When these two forces unite, they form a formidable synergy that can precisely target key decision-makers, nurture relationships over the long term, and tailor messages to address specific pain points. This coordinated effort ensures that major accounts receive a consistent and compelling experience throughout the entire sales journey, ultimately increasing the likelihood of conversion and bolstering the organization's revenue stream. In today's highly competitive B2B landscape, the convergence of sales and marketing efforts is not just beneficial but essential for achieving sustained success in securing major accounts.

Sounds great, but **how do you make this a reality** in an organization that has limited budget for investment in account-based marketing (ABM) platforms, infrastructure and organizational leadership? Here are seven steps that any organization can take at an acceptable cost with an extremely high probability for success:

1. Identify the **key problems** you successfully solve for current clients.
2. Identify the **top companies** most likely to be experiencing these problems.
3. Create a portfolio of creative messages to **raise awareness** to these problems.
4. Identify the job functions, titles and seniority of the most likely **decision-makers**.
5. Construct and activate a multichannel **ABM audience** using #2 and #4 above.
6. Create a **programmatic ABM** campaign using a goal approved by the sales team.
7. Deliver weekly account-based reporting (ABR) to sales on **pipeline activity**.





## #1 Identify the key problems you successfully solve for current clients.

Most businesses face common challenges that can be effectively addressed by partnering with other companies. Among these, four prevalent issues include **limited expertise, resource constraints, supply chain disruptions and lack of new business opportunities**. It is likely that your organization solves problems related to one or more of these common challenges. To ascertain if a specific company grapples with these challenges, conduct research by reviewing their financial reports, online presence, customer reviews and news articles. If at all possible, then engage in discussions with employees, partners or industry peers to gain insights into their pain points and business needs. This proactive investigation will not only confirm the existence of business problems, but also guide your approach in offering tailored solutions.

## #2 Identify the top companies most likely to be experiencing these problems.

In order to identify the top companies for your targeted ABM program, it is important to create a detailed profile of your ideal customer. Consider factors like industry, company size, company location, estimated budget and pain points that align with your solutions. The first step in doing this is to review your current customer list to identify common trends and characteristics of the clients you are currently having the greatest success with. Additional market research can also reveal industries and sectors that are experiencing these same challenges.

You can also leverage free and paid data and analytics tools to identify companies that match your **ideal customer profile (ICP)**. LinkedIn and Salesforce are two low-cost options, but marketing automation platforms also have a lot to offer. None of this should replace conversations with current and potential clients who can not only share their business challenges, but also inform you of the implications of their business problems. Stay informed on industry news and changes as well and you may find yourself reading an article about a company that is facing the exact problem that your organization can solve.



## #3 Create a portfolio of messages to raise awareness to these problems.

The most common error amongst business development leaders is to jump to 'selling solutions' versus **solution selling**. It sounds the same, but the process is much different. Until a prospect is aware of the magnitude of their problem, they are not in the ideal frame of mind to hear the solution. The value of a solution is extremely close to the magnitude of the problem, so keep your messaging focused on problems and implications and you'll get the attention you desire.

Regarding the format of these messages, it is easy to get overwhelmed with digital ad sizes and formats across various online marketing channels. For this reason, our firm recommends a standard ad portfolio that is aligned with ad inventory in the best places. A partial listing of preferred ad sizes and formats is provided below:

### Display Banners (5)

Billboard (970 x 250), Half Page (300 x 600), Leaderboard (728 x 90)  
Medium Rectangle (300 x 250), Wide Skyscraper (160 x 600)

### Interstitial Ads (4)

Tablet Landscape (1024 x 768), Tablet Portrait (768 x 1024)  
Mobile Landscape (480 x 320), Mobile Portrait (320 x 480)

### Native Ads (3)

Headline (55 characters maximum)  
Description (120 characters maximum)  
Image Sizes (1200 x 627, 800 x 600, 600 x 600)  
Logo

### InApp Ads (1)

Mobile Leaderboard (320 x 50)

### Video

Recommended lengths are 15, 30 and 60 seconds. Accepted file formats are MP4, FLV, WEBM, MOV, MPG and MPEG. Aspect ratios (sizes) are 16:9 (1920 x 1080) and 4:3 (640 x 360, 480 x 360 minimum). Video files must be less than 200MB.



## #4 Identify the job functions, titles and seniority of the most likely decision-makers.

Start with your **CRM database** to create a prospect list of job titles and job functions based on existing customers. Make sure that your base CRM file is comprehensive and up to date. This data should include customer names, companies, and any additional information you have in order to build an expanded prospect audience. Analyze your customer data to identify common job titles and job functions among your current customers. Look for patterns and trends that will help you understand the types of roles that are most likely to engage with your products or services.

The next step is to divide your customer list into segments based on these commonalities. For example, group customers with similar job titles or functions together. This segmentation will serve as a foundation for your prospect list. To further validate the prospect list to be effective, **conduct industry research** to understand the typical job titles and job functions associated with your target market. For example, there are often job titles that look much different but represent equivalent job functions. For example, a Senior Vice President of Data Sciences in one organization may be referred to as a Chief Analytics Officer in another organization. You can also leverage online tools and databases like LinkedIn, professional networking sites, and industry-specific directories to identify individuals with the desired job titles and functions within your target industries or companies.

## #5 Construct and activate a multichannel ABM audience.



If you have a demand-side platform (DSP) or ABM platform, then you likely will have the tools to do this. However, not all platforms have account-based reporting (ABR) built-in to support an effective integration of sales and marketing objectives. For this reason, you may want to use an **ABM audience builder** to create your audience and request a count prior to making an investment in data or media. There is no cost to do this and the outcome will provide you with an audience size that can be applied to your digital ABM campaign plan.

**Free ABM Audience Builder:** <https://www.programmaticb2b.com/abm-audience-builder>



## #6 Create a programmatic ABM campaign using a goal approved by the sales team.

If you start with a common goal, then your likelihood of strategic alignment is high. The challenge here is that objectives for sales and marketing rely on different core competencies. If roles are clearly defined and established, then building an effective sales and marketing partnership will lead to positive results. Far too often, marketing is required to deliver **sales qualified leads (SQL)** where the definition is dependent on a sales person's ability or inability to nurture or close. The inverse is also true, where sales representatives are expected to meet quotas from target markets having minimal brand awareness or online engagement. Here are a few objectives leading to a common goal of developing SQLs:

**Click-Through Rate (CTR)** > 0.50% for web ads and email. This is a common marketing measurement, but **not a good objective**. Clicks are often generated by machines to test ads and emails for spam and safety. Even clicks generated by real people are not necessarily valuable. For example, an interstitial ad may have a high CTR, but the resulting web engagement is low at best.

**Targeted Landing Page Engagement** > 15 seconds for web ads and email. This is a less common marketing measurement, but **a good one**. If sales reps have a list of their top 100 accounts and marketing can provide website engagement by job function and seniority for these specific accounts, then there is clearly an awareness and engagement benefit to the sales teams.

**Marketing Qualified Leads (MQL)** > 5 marketing qualified leads per month from specific companies in a pipeline. This is a common marketing measurement and **a good one**. However, unlike ABM programs many marketing campaigns generate leads from individuals who are similar to an ICP but do not have budget or decision-making authority. Google search campaigns often deliver a lower cost per lead (CPL) but a higher volume of unqualified leads. An example of a truly qualified marketing lead would be one that matches the company name, job function, seniority, and answers a question like **"are you currently in the market for...?"**

Good goals for sales and marketing to work together are those that promote alignment, collaboration, and ultimately, the growth of the business. They should reflect shared objectives and contribute to a seamless customer journey. On the other hand, bad goals can lead to misalignment, conflicts, and wasted resources. Once your goal is created, you can leverage your platform or partner to create the campaign setup in alignment with the supporting objectives.



## #7 Delivery weekly account-based reporting (ABR) to sales on pipeline activity.

If you've read this far, then you've made it. This last step is fully-automated and available on many platforms with options for CRM and sales pipeline reporting integration. The nice thing about account-based reporting (ABR) is that individual sales and new business development leaders can receive detailed information for specific accounts they are trying to reach, warm-up and close. Historically, ABR was only available from direct response campaigns where personally-identifiable information (PII) applied. However, with advanced data matching, identity resolution and IP targeting, marketers can now report back on banner display, native and video campaigns as well. Below is an ABR sample for a Programmatic B2B telecom expense management (TEM) client program:

Job Seniority: Director, VP, SVP, EVP, General Manager						Programmatic B2B	
Job Functions: Technology - Telecommunications, Systems Administration							
Company URL	Company Name	Impressions	Clicks	Landing Page	Average Time	Video Completions	Conversions
medtronic.com	Medtronic	87,293	175	158	24 M, 11 S	325	2
aetna.com	Aetna	55,300	111	106	15 M, 35 S	209	
cigna.com	Cigna	40,710	82	84	11 M, 4 S	158	
pfizer.com	Pfizer	33,868	60	71	11 M, 23 S	124	1
ge.com	General Electric	29,161	57	64	9 M, 2 S	113	
stanleyblackanddecker.com	Black & Decker	28,956	57	55	7 M, 12 S	102	
uhc.com	United Healthcare	24,565	59	44	18 M, 21 S	92	1
nbcuniversal.com	NBC Universal	23,800	42	47	7 M, 47 S	80	
xerox.com	Xerox Corporation	20,235	45	31	6 M, 24 S	64	
thehartford.com	The Hartford Group	19,687	42	48	7 M, 8 S	81	1
travelers.com	Travelers Insurance	17,565	36	35	4 M, 15 S	61	
yale.edu	Yale University	16,138	33	30	5 M, 25 S	52	
gecapital.com	GE Capital	13,067	20	23	1 M, 39 S	33	1
boehringer-ingelheim.com	Boehringer	12,534	36	33	5 M, 48 S	58	
duracell.com	Duracell	12,390	28	21	2 M, 16 S	38	
pitneybowes.com	Pitney Bowes	11,533	25	22	2 M, 54 S	36	

The latest on ABR is that this type of reporting can now be generated internationally. Until recently most account-based marketing programs focused on US audiences where the underlying match capabilities was built-in. Today, companies like Netwise, Lead Forensics, Dealfront and others are enabling ABR for DSPs, ABM platforms and partners like us. Results from ABR templates can be linked or uploaded to custom fields in Salesforce and other CRM platforms as well.