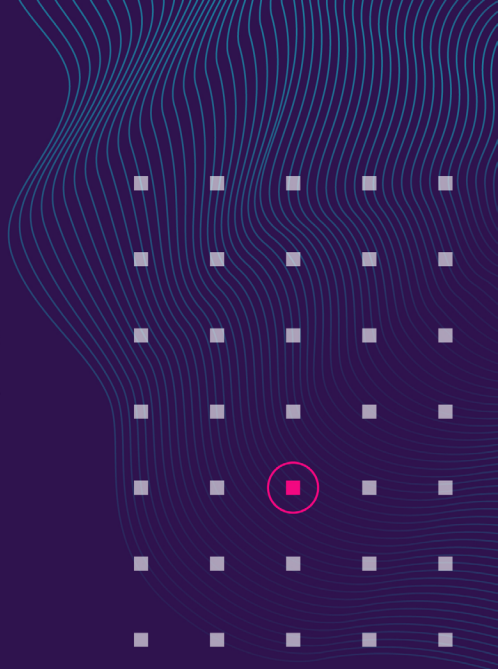


YOUR NO-FEAR GUIDE TO SCALING PERSONALIZED CONTENT FOR ABM



UBERFLIP GUIDE

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INTRODUCTION

Account-based marketing is nothing new. Heck, it's been around since the early 2000s. But there's been an increased focus on it as of late. As B2B buyers are bombarded with messages from all angles, marketers are looking for a targeted, personalized approach to cut through the noise and put more of their marketing spend toward top-tier, high-value accounts. The fear of putting all your eggs in one basket is gone, so long as the approach is strategic, and the potential results warranted.

Account-based marketing, or ABM, encompasses strategic and personalized marketing outreach and engagements with people at target accounts through close collaboration between sales and marketing. Or at least that's how Engagio defines it, anyway.

Let's unpack that briefly. ABM is not a campaign burst, but rather a planned and continuous outreach. It's a strategy built on account-specific insights with tailored content and messaging for a collective of individual accounts. And finally, ABM is a continuous and intentional cooperation between



sales and marketing. ABM won't be successful without sales' buy-in and support.

While a lot has been solved for on the planning, segmentation, alignment, and results fronts, the concept of personalization at scale is what's keeping many of today's marketing teams up at night.

A recent survey of B2B marketers engaging in an ABM strategy showed that while creating content by account segment is one of the most effective strategies for engaging target accounts, it's also one of the most difficult to execute.

This ebook will walk you through how to scale personalized content for ABM. Our goal is to eliminate your content personalization fears so you can provide tailored, targeted experiences for your best prospects without losing sleep over the creation of hundreds of pieces of content for your ABM approach.

Let's dive in.



Section One

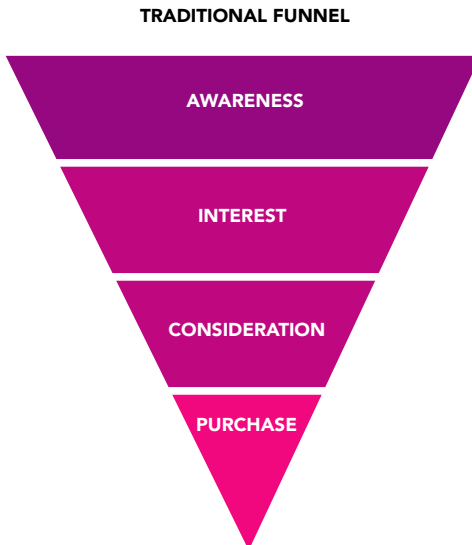
SELECTING YOUR ACCOUNT APPROACH

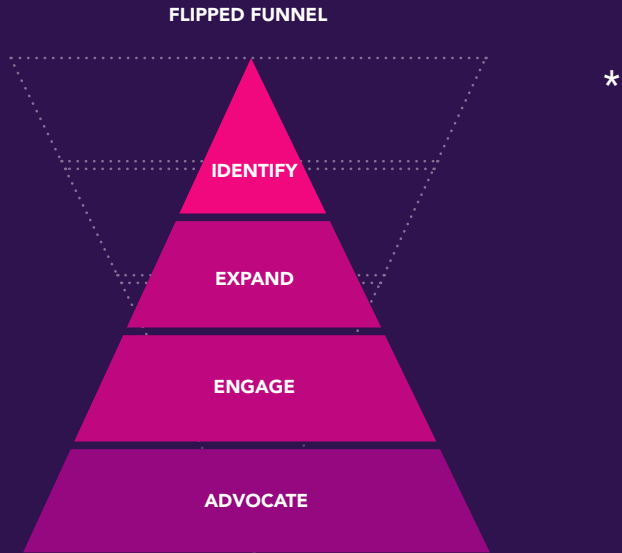


One of the key characteristics of ABM is the “flip the funnel” thinking and approach. Conventionally, marketers create marketing campaigns by following the purchase funnel of awareness, interest, consideration, and purchase:

- Build awareness of the brand
- Educate people about the benefits
- Entice people to consider
- Facilitate the purchase decision

For ABM, it’s exactly the opposite. You, first, need to identify the key accounts, then you work with the sales team to expand and engage with a group of individuals in the accounts through strategic and planned outreach.





The overall content experience for the flipped funnel is different than that of the traditional funnel. Rather than narrowing down a prospect through different stages of qualification like the traditional purchase funnel, flipping the funnel requires starting with those qualifications and expanding outwards to the next stage.

The engagement stage of account-based marketing is where content comes to life. This stage involves using multiple channels to activate targeted and integrated marketing outreach to engage with your prospects. Be creative—think emails, webinars, targeted and programmatic advertising, video content, events, ebooks or white papers, and more. By delivering a strong personalized content experience, you can further engage your target accounts and turn customers into advocates.

For many organizations, it makes sense to dip your toe into the ABM pool by leveraging technology to create personalized experiences at scale while also trying out some high-investment, high-reward plays for top-tier accounts.

DETERMINE WHICH TIER OF PERSONALIZATION YOU NEED

The general perception is that ABM applies only to high-effort, high-return one-to-one marketing. The truth is that you can implement ABM with a few mega-accounts or thousands of smaller target accounts. You can focus on one tier or combine strategies and outreach tactics for multiple tiers.

ABM has three tiers of personalization:



ONE-TO-ONE:

A marketer works with the account team to develop and implement highly customized programs for individual accounts.



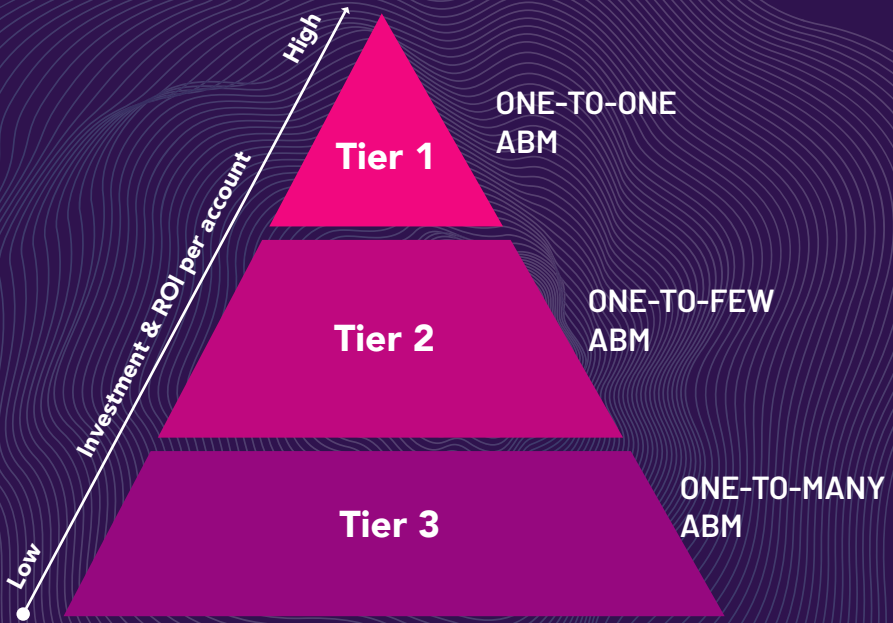
ONE-TO-FEW:

A marketer works with sales teams to focus on a few accounts that share business imperatives.

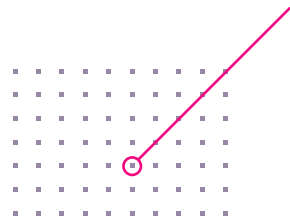


ONE-TO-MANY:

A marketer targets verticals or segments with common needs.



Although the number of accounts in each category varies depending on the size of your sales team, number of customers, revenue, pipeline, etc., you can determine the number of accounts in each category based on your own selection criteria and your company's needs. According to the [2017 ITSMA Benchmark Study](#), the average number of one-to-one accounts is 13, one-to-few is about 50, and one-to-many is 725. This tiered approach helps marketers determine what content they require.



TIER	# OF ACCOUNTS	TACTICS
ONE-TO-ONE ABM	<30	<ul style="list-style-type: none">• Account-specific plan• 1:1 personalization in sales engagement, customized marketing outreach• Content is highly customized• Executive support• Frequent collaboration with account teams
ONE-TO-FEW ABM	50-100	<ul style="list-style-type: none">• Scalable account-specific plan• Limited personalization• Timely meetings with sales teams• Content is customized for a cluster of accounts based on characteristics or criteria
ONE-TO-MANY ABM	>500	<ul style="list-style-type: none">• Vertical or segment-driven outreach• Focus on vertical or segment-specific challenges and pain points• Inbound marketing with targeted outbound bursts• Customize standard content for verticals or segments

SELECT YOUR ACCOUNTS WISELY

Once the tiered approach is agreed on by sales and marketing, the next and most critical step is account selection. If accounts are not selected prudently, it wastes the sales and marketing teams' time and reduces the sales team's focus on selling to other accounts that directly impact sales revenue. Another critical reason to select accounts carefully is that it further guides content planning and personalization efforts.

If the teams decide that one-to-one ABM is the direction, marketers need to gather account-specific insights and integrate with the marketing side of content landscape, buyer personas, and purchase journeys. If the teams go with one-to-few or one-to-many approaches, some standard content needs to be customized by a cluster of sales accounts, verticals, or industries. Therefore, it's vital for marketers to understand how accounts are selected.

Accounts are selected, typically, based on these criteria:

- **FIRMOGRAPHICS:**
Attributes about a company, such as size, number of employees, annual revenue, industry vertical, growth, and number of locations.
- **TECHNOGRAPHICS:**
An account's current and future technology (such as tech stack) and its organization environment.

- **PURCHASE INTENT:**
Behavior indicators showing intention to buy. For example: content downloads and participation in forums or social media.
- **ENGAGEMENT HISTORY:**
The company has already engaged with you—sales, web analytics, CRM, marketing automation data, and sales rep activities.
- **SALES TEAM'S INPUT:**
Engagement history and experience.

Some companies use a manual process whereby the sales team evaluates and finalizes the accounts. Some companies use a predictive analytics model, which processes all the selection criteria and additional CRM customer data to provide more objective recommendations. Even with predictive analytics, humans play a role in making the final decision as to which target accounts to pursue for ABM.

Although your sales team has the final say about each account, you, as a marketer—if the potential accounts have engaged with you on your websites or social media channels—can influence the decision by sharing engagement history and purchase intent with your inbound and outbound analytics.

The data and analysis used for account selection play a critical role in the next step.

Gather Account-Specific, Tier-Based Insights

This stage is much like creating buyer personas for your broader marketing outreach. Understanding your target audience and buyer's journey is critical for any marketing campaign, and the ABM approach is the same. As a marketer, to support ABM, you must have a strong grasp of the target accounts and the collective of individuals that you are going after.

It's about gathering account-specific insights. Only when armed with those insights can you hone in on your personalized content planning. A good chunk of account-specific insights reside in the data used in the selection criteria: firmographics, technographics, purchase intent, engagement history, and sales team's input. Your job is to study and transfer the data into knowledge that you can use for personalized content planning.



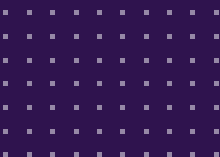
Align Account Insights with Messaging and Personas

Once you transfer the data to your own knowledge, you can use the information in various places as part of content planning and marketing plans. For example, you can use technographic information from that account to understand their technology gap and then source and customize account-specific, solution-driven product information and content for the account.

Further, some of the firmographic and technographic data can be used as reach criteria for target-programmatic advertising and content syndication. The more insights you have about accounts, the more easily and effectively you can personalize marketing outreach and content planning.

Regardless of the tier, you must have a solid understanding of, and insight into, accounts. For the top tier, deep research is a must. For the lower tiers, limit personalization and find commonalities among accounts.

ABM is a strategy rather than a program or a campaign. The craft of your strategy and game plan starts with deep account insights.






Section Two

WHAT CONTENT DO YOU NEED FOR YOUR ABM STRATEGY?



Now that you've determined your account approach, you're ready to figure out what content you need. Even if taking an ABM approach is new to you, you'll still apply familiar content marketing principles to your accounts.



Here are the steps you can take to personalize content for your ABM strategy:

- Understand your content landscape by conducting a content audit.
- Map content to the account-specific purchase journey based on account insights and tiers.
- Create and source a mix of original and curated content based on content gaps.
- Craft a marketing outreach plan, and use content accordingly.

UNDERSTAND YOUR CONTENT LANDSCAPE BY CONDUCTING A CONTENT AUDIT

Your tiered approach and your account plan guide your messaging and content development. To avoid potential content duplication, a content audit can help you decide what content you need.

You can start the audit by aggregating content from various sources and content libraries. You can also pull a list of content from your websites by working with your webmasters or by using available content audit tools.

Once you have the list, organize and segment content pieces into contextual collections, grouping them by topics, product lines, industries, verticals, past performance, buyers' journeys, personas, and more. Depending on how you plan to use your content, you can segment it based on a wide range of attributes:



ATTRIBUTES	DESCRIPTION
Title	Name or title of the piece of content
Internal URL	Where internal teams can go to access this piece of content
External URL	Where the public can go to see this piece of content
Published date	Original date of publication
Expiration date	Expiration date of publication
Last updated	The last time this content was edited or updated
SEO status	Whether this content is indexed by search engines
Title tags	SEO title that's indexed by search engines
Meta description	SEO description that's indexed by search engines
Word count	The number of words in this item
Author	Who wrote this piece of content
Accessible by	The teams or people who can access this piece of content
Topics	The topics this content item is related to
Industries	The industries this content item is related to
Target persona(s)	The persona(s) who would find this content item relevant
Monthly traffic	The total monthly traffic this piece receives
Social shares	The number of social shares this piece has received
Social Likes	The number of social likes this piece has received

If you have a massive amount of content—especially if your products are regularly refreshed and updated—focus on the content published in the past 6–12 months to narrow down the list.

MAP CONTENT TO THE ACCOUNT-SPECIFIC PURCHASE JOURNEY

Content personalization is largely dependent on account insights and the tier approach you've chosen. You can highly personalize your content for key accounts, or you can segment your list and send relevant content to multiple accounts who share similar challenges.

Once you have solid account insights and a well-organized content list, you can map or customize content based on your tier approach and account insights.



ONE-TO-ONE ABM

Even with account-specific insights, you need to dip into specific individuals' personal tastes and preferences to create outreach exclusively for them. And don't limit personalization to content—you might send a personalized goodie box to open the door for the first phone call or a face-to-face meeting for the sales team. You might also send a customized email with relevant content based on challenges or questions discovered during your research, website engagements, or keyword search. (Take care not to be creepy!)

It takes a significant investment of time, resources, budget, and research to put together a plan to engage with select individuals in this tier of ABM. To create the personalized touch, stay close with the account team and constantly pay attention to the individual's online and offline activities.



ONE-TO-FEW ABM

For this tier, you target a cluster of accounts with similar technographics, firmographic data, or profiles. For instance, if they use the same tech, are the same persona, and have the same challenges, you can create a direct mail with content that speaks to all of those accounts with some level of personalization.

This ABM approach enables you to apply the same creative idea or the same play to a set of accounts. You can map content based on their purchase journeys or the sales enablement efforts. Understanding the salespeople's game plan can also help you determine the relevant content for this approach.



ONE-TO-MANY ABM

You can segment your accounts by broader industry segments or verticals. Many marketing organizations already do vertical-specific marketing campaigns. For one-to-many ABM, to further segment the accounts or refine your content plan within the same verticals, you can use data from firmographics, technographics, purchase intent, engagement history, and sales' input. Even though it's a one-to-many approach, it's still important to work closely with the sales team and solicit their feedback on your outbound and inbound marketing communications.



Create and Source a Mix of Original and Curated Content Based on Content Gaps

While mapping content to an account or a vertical-specific purchase journey, you may discover that you need to create new content for personalization. It can get expensive to create new content whenever there is a gap or whenever an account requires exclusive personalization.

To address the gap in new content, you can create, repurpose, or source content using a content curation platform. Similarly, go back to your content audit spreadsheet and select content to send based on how you've labelled each piece in your spreadsheet. Remember that creating a personalized content destination for target accounts includes mixing original and curated content for a specific account or account type. Arming yourself with account-specific insights and inquiries based on firmographic and technographic data can help you identify a selection of content from which to choose for your personalization efforts.



Craft a Marketing Outreach Plan

With a tiered approach, account insights, content knowledge, and mapping, you can craft your marketing outreach plan using a mix of marketing channels. While you may still use the same channels, you can now determine which channels to dial up or dial down.

For the outreach plan, it's a matter of budget allocation and understanding the optimal channel to use for your ABM efforts. Engage contacts on the channels where they are most active with the messages and content they want.



Here is a table
of marketing
channels for
the three tiers:

	DESCRIPTION
MARKETING EMAIL	Email is the most effective content distribution method across the board. Personalization is a crucial component for ABM.
PAID ADS	Paid ads targeting named accounts can help garner the attention of your named accounts.
DIRECT MAIL	While traditionally used for gifting, direct mail can be used to promote and distribute tailor-made content for ABM.
SOCIAL	Social is an interesting way to engage with target accounts, but for distribution, it can lack depth.
SALES EMAIL OUTREACH	While the type of content sales may send to target accounts will differ from marketing, their outreach is still a distribution channel for ABM content.

ONE-TO-ONE	ONE-TO-FEW	ONE-TO-MANY
<p>Personal email to single account with link to hand-picked content for that account based on their needs.</p>	<p>Personal email to each account with a single piece or collection of content selected for accounts with their profile.</p>	<p>Automated marketing email with personalization by persona or one specific attribute. Think segmented email marketing promoting a single piece or stream of content based on their profile.</p>
<p>Danger! Seeing an ad with your name or company logo can enter into too-creepy territory. Avoid at all costs.</p>	<p>Custom digital ads based on the account profile that target IP addresses or company name (e.g., on LinkedIn or Facebook) and push to content.</p>	<p>Generic digital ads that target IP addresses or company name and push to content they may be interested in.</p>
<p>Pushing to online content from a direct mail play can work if the asset is highly customized to the account. Or use direct mail as the actual distribution channel and send a printed custom ebook or magazine with their face on the cover in the mail.</p>	<p>Sending lightly customized content directly to their office or pushing to highly personalized online content.</p>	<p>Get their attention with a gift and push them to content online.</p>
<p>Tweeting at, messaging, or tagging a target account in content they might like isn't a bad strategy when you're an actual person rather than a brand.</p>	<p>Resist sliding into your target account's DMs to push tailored content.</p>	<p>Nope. Just don't do it. Don't mass tag, tweet, or message anyone to promote your content. Ever.</p>
<p>Personal email to single account with link to personalized collection of content hand-picked for that account based on their documented needs and profile.</p>	<p>Personal email to single account with link to hand-picked content specific to their profile and needs.</p>	<p>Personal email to single account with link to content specific to their profile.</p>



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Section Three

Personalized Content in Action

Ok, so now that you know what to do, let's see some examples in the wild. In this section, you'll see real-life examples of content personalization in action and how different tools and technology can help.





One-to-one

Personalized email with account-specific content or tailored responses on social media is a given. To catch people's attention, consider creative approaches beyond content marketing: customized invitations to exclusive events, early use of your new products, special expertise support, and more. Marketing can only influence personalization with the existing channels they manage. To create a seamless one-to-one experience, marketing must work with the sales team and executives to craft a one-to-one plan.

EXAMPLE 1: GUMGUM

T-Mobile is a target account for GumGum, an applied computer vision company. The marketing team noticed that T-Mobile CEO John Legere is incredibly active on social media. He supports his company as often as he can, he likes to wear the color magenta, and he loves Batman. As T-Mobile was unrolling its unlimited data plan, GumGum wanted to show T-Mobile how valuable their computer vision technology could be and highlighted how the two companies could collaborate. Rather than going through the usual channels or sending a typical outbound email, the marketing team thought it would be smarter to go down a more personalized path. So they built a creative team of editors, writers, illustrators, and letterers who spent months making a comic book called T-Man and Gums.

When the comic book was complete, they shipped 100 copies to T-Mobile and its agencies of record. Within hours, Legere reached out on Twitter to praise the work. And within a few days, a meeting was set. The ABM tactic was definitely a risk, but it sparked a meaningful conversation that eventually led to T-Mobile becoming a client.

T-MAN AND GUMS

IN...THE DATA KNIGHT THE GIRL WONDER



Gums! Can your **Computer Vision** system tell what people are looking at, on their phones and tablets?

What photos; which videos?

Like, *duh*, of course.

I built the best image recognition system on the Net.

So we can tell people about our unlimited music streaming, when they're looking at photos of their favorite singer.

Yeah! **In-image ads** that suggest cool things to them in fun ways, but don't interrupt their experience.

Exactly. They just offer something **more**.

And when tourists look at photos of the city's sights, we can tell them about our unlimited global data!

Ooh, or when checking out Pokemon Fan-art we can tell them about our Free data For Pokemon Go players!

And if they're watching movie trailers on Youtube--

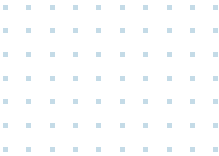
--or cat videos--

we can remind 'em about our One plan, and how it means they can stream all the things!

Stream all the things!


EXAMPLE 2: UBERFLIP

At Uberflip, we discovered that a new contact at an important account loved basketball and the rap star Drake. We created a custom card with Drake lyrics and sent it to her—with a basketball and the promise of Toronto Raptors tickets for the next time she was in town. (Drake, a lifelong Raptors fan, is the team ambassador.) We piqued her interest enough for her to engage with us on social media, which led to more conversations with our team.



“
**Know yourself,
know your worth,
Actions speak
louder than
my words.**

- Drake

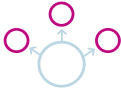
 Uberflip



Sarah Kennedy @Sarah Kennedy · 4h

If only I had known this brilliant little gift had been waiting in SFO for me from our friends @Uberflip I would've come back sooner! Thanks @randyfrisch for this & your great partnership (+sorry for my slow response!) I'm tempted to put this to use ASAP...🏀🤗🏀#personalization





One-to-few

A goodie box or a basket with thoughtful products or even company merchandise is a great way to reach out to a cluster of target accounts. This might be a conversation starter to open a door, or it might be a seasonal gift to rekindle a relationship. That goodie box can include specially printed content that you deduce to be helpful and relevant to those accounts.

EXAMPLE 1: INFLUITIVE

Influitive, an advocacy engagement platform, discovered that a lot of their target accounts were not aware of reviews of their own products. The Influitive Marketing Team decided to send their contacts at these accounts a personal package that contained a review about their company on a third-party review website.

The marketing team thought it was a good introduction point for talking about what they could do to get more customer reviews.

The packages included a handwritten note from the sales reps, a review from one of the prospects' customers, and an Influitive sticker. Some also included an ebook about generating a sales pipeline with the help of customer advocates. They sent it in a nice box via UPS, which helped them track the package so they knew when to follow up.





Print out of your
customer review



Our
handwritten
note



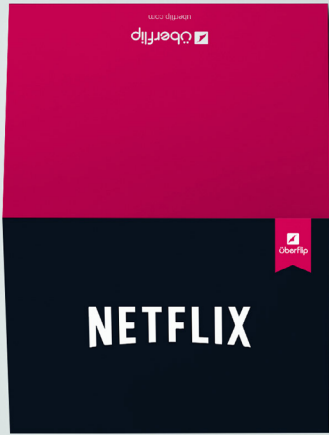
Physical copy of
our ebook

Example of our ABM campaign package

EXAMPLE 2: UBERFLIP

Our Marketing Team at Uberflip targeted and segmented accounts with similar profiles. We then created a direct-mail play, ads, and content streams that spoke to these accounts with limited personalization. This Netflix goodie box included popcorn and a Netflix gift card to encourage people to book a demo with us. We tied this direct-mail effort to a personalized landing page with relevant content and to a personalized follow-up phone call and email. We sent out Netflix goodie boxes to 500 target accounts, and it led to 40 net-new opportunities. So far this campaign has netted a 450 percent return in closed revenue and there is still lots of open pipeline from this campaign.







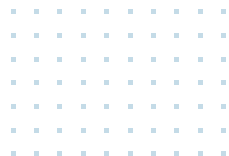
One-to-many

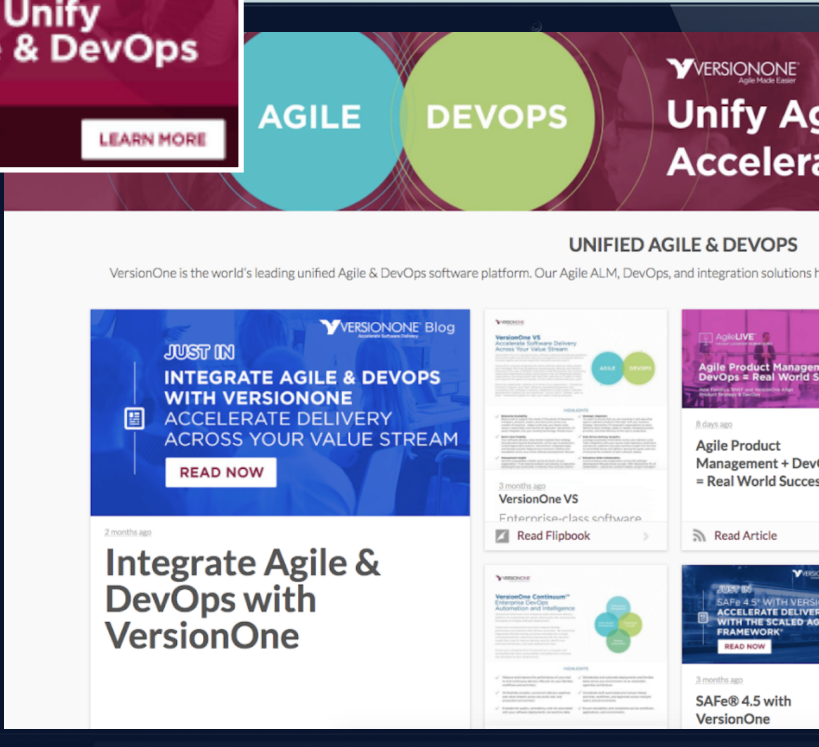
This is probably in most marketers' bag of tricks along with target programmatic ads, use of marketing automation, and outside sales outreach based on verticals, industry segments, and any other classifications your company uses. Since the personalization is limited, you focus on specific commonalities for outreach.

EXAMPLE 1: VERSIONONE

VersionOne, now CollabNet VersionOne, an enterprise value stream management company that accelerates software development and delivery, took an account-based marketing approach to compete with large competitors they knew they'd have a tough time outspending.

In an effort to create engagement in their target accounts, they took a one-to-many approach with content at the core. They developed a three-tiered approach to clearly articulate the level of customization and investment for each tier. They targeted several hundred accounts and segmented them by industry. They targeted accounts with a multi-touch approach across a mix of inbound and outbound tactics and channels, including targeted display advertising with LinkedIn and Terminus. They often sent target accounts to a branded Uberflip destination tailored by industry segmentation or the specific target account.





When VersionOne first set out their ABM strategy, their goal was to achieve 20 percent engagement from their target accounts. They were blown away when 88 percent of their target accounts had engaged with their content. What's more is that they doubled the number of opportunities created and sales appointments made for accounts targeted by ABM efforts.



EXAMPLE 2: UBERFLIP

At Uberflip, we've targeted accounts by buying stage. The messaging is less account-specific so that we can widen our breadth. To reach out, we use content targeted to this segment in customized emails or in targeted digital ads. The open and click-through rates of email and outreach content depend on copy, creative, and content. In general, we found that tailoring the message to where the accounts are in the buyer journey works well for less personalized communications.



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Uberflip Reviews

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ASK UBERFLIP

Filter Reviews

Ratings Company Size User Role For Category

Search Review Text

Default

Showing 87 Uberflip reviews

LinkedIn C



Shauna W.

- Validated Reviewer
- Verified Current User
- Review Source

★★★★★ October 17, 2018

Business partner of the vendor or vendor's competitor, not included in G2 Crowd

"Excellent product, even better team"

What do you like best?

Uberflip has made it easy for us to build not only a robust resources section on our website, but also custom content experiences for different segments of our audience — no code required. Plus, Uberflip's customer support and coaching is top-notch. Dylan has been my success coach for about two years, and he's helped me take our content experience to the next level, from a simple page to beautiful and functional.



Measuring Your Success

After creating and selecting the right content and crafting the perfect personalized content experiences (at scale), you'll want to measure the success of your efforts. ABM requires marketers to work closely with the sales team and think and behave in a new way. Since this approach is account-based, the metrics must tie to sales goals: opportunities generated and revenue closed. These metrics dependably indicate whether your ABM programs are driving a positive ROI from the accounts.

While these metrics belong at the top of your list, many ABM programs have a more nuanced influence on sales, requiring additional metrics. Here are the options to consider adding to your success metrics:

CATEGORIES	DESCRIPTION	EXAMPLE
ENGAGEMENT	Engage with target accounts	<ul style="list-style-type: none">• Target account inbound website traffic• Event and webinar attendance• Ad conversions• Email opens and click rate
SALES EFFICIENCY	Measure the influence of sales pipeline	<ul style="list-style-type: none">• Book meeting rate• Opportunity creation rate• Revenue closed
DEAL VELOCITY	Measure how quickly ABM accelerates the closures	<ul style="list-style-type: none">• Number of days to close vs. average close
CUSTOMER LIFETIME VALUE	Measure the size of deals and lifetime value of accounts	<ul style="list-style-type: none">• The deal size• Customer lifetime value

One caveat: Tie your metrics to sales goals! Be wary of vanity metrics, which can cause your company to quickly lose confidence in account-based marketing. Know how your sales teams are measured, and show how ABM impacts these metrics.

Technology can add sophistication and insight to your analytics and provide a deeper understanding of engagement throughout the target accounts' journey. Depending on what is important to your audience, it may be worth investing in tools that enable you to better measure engagement from your target accounts with your website, content, ads, events, and overall attribution.

While there are many considerations in measuring ABM, it's important to work with the sales team to determine the success metrics. Their buy-in and alignment on measurement methodology help you make better decisions, build internal confidence, and prove the value of your work.





Conclusion

Personalization is what's needed to reach buyers in today's world. And the success of account-based marketing is proof that's the case. In a recent survey by Alterra Group, 97 percent of marketers said ABM had higher ROI than other activities. The future is ABM and so the need to scale personalized content isn't going away.

However, as marketers, we need to be realistic with our expectations and considerate of where we spend our time and content resources. Yes, ABM is a targeted, personalized approach, but not every account will need that one-to-one personal touch.

We know it can seem overwhelming, but it doesn't have to be. With the right framework or methodology, you can determine what you need, how personalized you need to be, and what technology can help you do it at scale without losing sleep at night.



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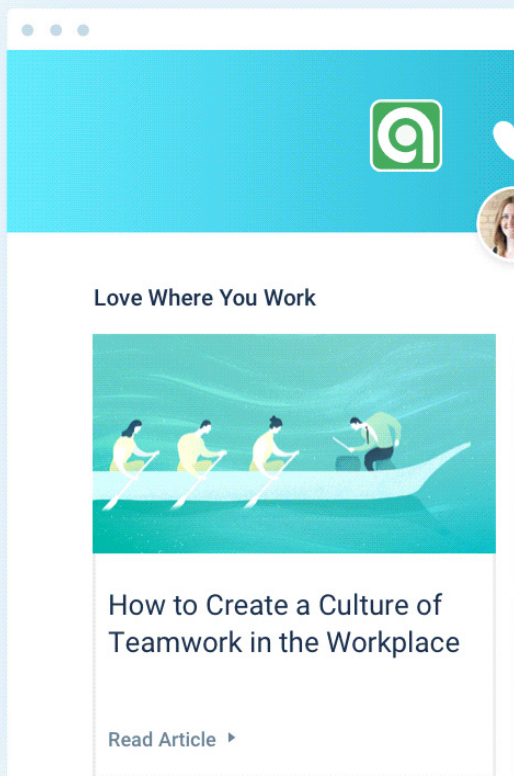
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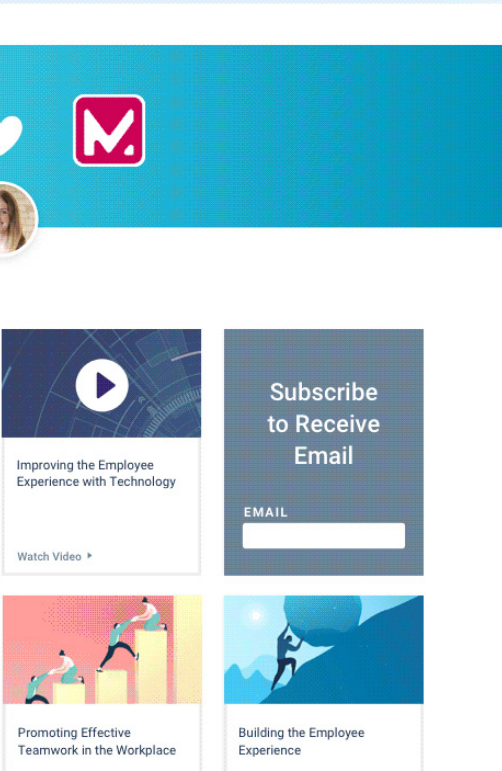
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