



DEMANDBASE

EBOOK
**THE B2B MARKETER'S
GUIDE TO WEBSITE
PERSONALIZATION
AND ENGAGEMENT**

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As B2B marketers, we spend a lot of time and money driving visitors to our websites. We invest in display advertising, PR, SEO, SEM, content, and various social channels. And while we may be successful in attracting visitors to our sites, the game is far from over once they arrive.

Our next, and arguably larger challenge is to deliver better, more relevant site experiences in order to get our prospects and customers to engage with us—to keep coming, stay longer, and more actively engage with our offers and content.

Why? Because better connections with our customers can result in higher profits.



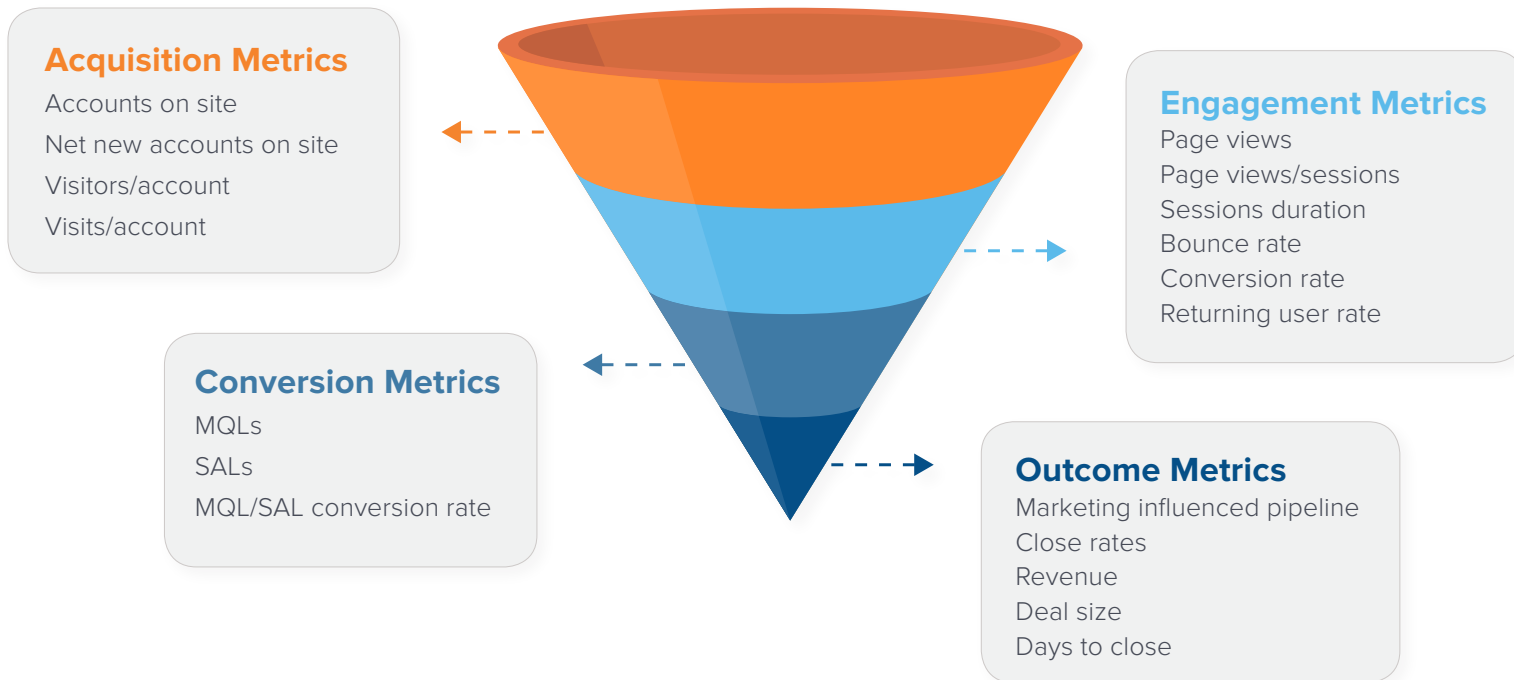
Demandbase found that target accounts who saw our ads and engaged on our website were **60%** more likely to turn into opportunities.

SO, WHAT EXACTLY IS A “BETTER” OR “HIGHER BRAND” CONNECTION?

B2B marketers call it engagement and it's a critically important pillar of Account-Based Marketing (ABM) as we'll see shortly. First, let's start with a simple definition of engagement: by how it's measured. The following graphic details key ABM metrics across the full customer journey and highlights engagement metrics in particular.

Are potential customers hitting your site, but bouncing right away? Are they spending more time on site compared to last quarter, or less? Do they come and view two pages or six? Are they interacting with your content—filling out forms and downloading? These trackable behaviors are signals of engagement.

ABM ENGAGEMENT METRICS FOR YOUR TARGET ACCOUNT USERS



THE GOOD NEWS IS, OUR CUSTOMERS EXPECT US TO BUILD BETTER CONNECTIONS WITH THEM

“People expect brands to be using the data they receive from them to create and deliver better experiences. Unfortunately, most teams are missing the mark.”

- Forrester

While world-class engagement can be a challenge, when we get it right, we leap right to the front of the pack. In particular, leading b2b marketers who embrace ABM jump ahead by engaging those who represent the best opportunities—those from the right companies, industries, geographies, etc. Importantly, we want to zero in on those who are also displaying purchase intent—consuming online content related to our products and services.

Once we identify the companies who have real interest in our solutions, our job is to then launch them into an engagement path that accelerates their journey from unknown visitor to qualified sales opportunity. The challenge lies in a few hard facts around who actually visits our website and what they actually end up doing.

82%

of website visitors are
not potential customers

(Demandbase)

97%

of website visitors
never fillout a form

(Adobe)

60%

of website visitors leave
after 10-20 seconds

(Nielsen Norman Group)

MINI CASE STUDY: PROGRESS - ENGAGEMENT METRICS

Progress, a best-in-class platform for deploying apps, microservices and leading data connectivity quickly and easily, delivered personalized messaging across four key industries on their home and product pages. Showcasing relevant success stories and messages for each targeted industry, Progress was able to increase engagement by driving visitors deeper into the site, increasing pages viewed per session and decreasing exit rates. By focusing their personalization efforts on the industries that represented their best opportunities, **Progress increased engagement on the home page by 55%, and overall by 43%.**

IF WE TRULY SEEK MARKETING ADVANTAGE, WE CAN'T KEEP PLAYING BY THE SAME OLD RULES

We have to roll up our sleeves and lean in on a stand-out engagement strategy that supports our ABM efforts. Indeed, engagement is a key part of successful ABM practice. To see how, let's start with a quick reminder of why B2B marketers invest in ABM in the first place:



The best opportunities

The practice of ABM ensures attention is given to top prospects and customers.



Sales reality

Marketing becomes more efficient when focused on a defined universe.



Customer-centric experiences

Increases customer engagement, satisfaction, loyalty and retention.



Marketing's impact

Connecting activities to business outcomes makes marketing ROI easy to measure.

Engagement falls squarely under delivering customer-centric experiences. One of the key reasons we practice ABM is to cut down on noise, increase relevance, and get our customers and prospects to deepen their connection to us through customer-centric experiences. Here are the fundamentals you'll need to master in order to build, scale and optimize engagement to keep your ABM practice humming on all cylinders. We'll unpack each of them in the next four sections.

1. Building the foundation: targeting and segmentation

3. Measuring engagement success

2. Customizing the visitor experience

4. Aligning resources and developing workflow

1. BUILDING THE FOUNDATION: TARGETING AND SEGMENTATION

When it comes to B2B marketing, there are several tried and true lenses which you can apply to your audience in order to create meaningful—and importantly— differentiated segments:

- 1. Industry** - Industry verticals are one of the most common ways B2B companies approach their markets, and one of the most successful. Why? Because industry verticals tend to have unique and specific attributes, pain points, and goals. Financial services companies tend to be more conservative and can often be focused on compliance issues, for instance, whereas manufacturers typically care more about cost and time to value. Retailers care about maximizing loyalty and customer lifetime value, while software and technology companies are laser focused on innovation. Because we typically get just one chance to make a good impression, focusing your personalization strategy on the right issues for your industry visitors is a great way to demonstrate that you know what matters to them—and that your solutions are the right fit for their particular needs.
- 2. Company size (employee size or annual revenue)** - Mid-market companies typically face much different challenges than SMBs or enterprise organizations. They also have different buying committees, sales cycles and decision processes. Mid-market tech companies may be focused on producing productivity gains, while enterprise tech companies may have their sights set on deeper investments in machine learning. Small business tech organizations, on the other hand, are often concerned with creating scale. Just as with industries, your offerings and messages may be aligned with organization size.
- 3. Journey stage** - Various content offers can play significantly different roles at different stages in the buying cycle from a paper that defines an industry problem (awareness-focused content), to data sheets that describe your particular value proposition (engagement-focused), to an RFP checklist (consideration-focused). If you're ready to double down on a segmentation strategy focused on the customer journey, oftentimes the first place to begin is with the creation of a customer journey map.
- 4. Product usage** - Segmenting by product usage is particularly useful for developing engagement strategies that advance cross-sell and upsell opportunities. If you know you've sold a customer a printer, an obvious follow up customer experience would be to present them with an offer to buy ink.
- 5. Customer/Prospect/Partner**- Whether you're trying to land new business, expand opportunities with a current customer or deepen a relationship with a partner, you'll want to create relevant, targeted messages that resonate with each. Prospects may need to know more about who you are and what you do, while customers may respond well to special offers for upsells. Partners, on the other hand, may be best motivated by reminders of your position as an industry leader.

SEGMENT	ATTRIBUTE
Industry	Software and Technology - Healthcare - Financial Services

Table 1. Example of simple segmentation—one primary segment, industry, with three unique attributes, software & technology, healthcare, and financial services.

SEGMENT	ATTRIBUTE
Industry	Software and Technology - Healthcare
Web Traffic	High - Medium
Marketing Tech Used	Analytics: Adobe or Google Analytics, and MAS: Eloqua or Pardot
Geography	US - Canada

Table 2. Example of multi-attribute segmentation. In this case, the companies we want to target are either in software and technology or healthcare with medium or high volumes of web traffic that use specific marketing technologies and are headquartered in either Canada or the US.

MINI CASE STUDY: OUTSYSTEMS - JOURNEY STAGE PERSONALIZATION

Outsystems, a supplier of low-code development coupled with advanced mobile capabilities, sought to focus on acquiring new accounts plus expanding business with current customers. They used account-based advertising to attract the right accounts to their website, but also used a three-stage funnel-based personalization strategy to deliver unique, customized messages to guide customers and prospects through the buying process. Outsystems' personalization strategy led to a 3.6x increase in content consumption and a 59% increase in page views. *(Hint: Increased engagement is a leading indicator to increased win rates and decreased time to close in the sales funnel.)*

SEGMENT	ATTRIBUTE	BASIC CRITERIA + FIT + TIMELY EVENT
<ul style="list-style-type: none"> • Revenue • Headcount • Region • Industry 	<ul style="list-style-type: none"> • Demonstrating a need • Showing interest in our value proposition 	<ul style="list-style-type: none"> • Researching relevant topics • Engaging with site content • Presence of a buying committee

Table 3. Example of advanced segmentation that uses multiple criteria

How Do You Know if You Have the Right Segmentation Strategy?

It's important to ask yourself a few key questions before you settle in on your approach:

- Are your segments truly different in a meaningful way?
- Are your segments large enough?
- Do each of your target accounts fall clearly into one segment or another?

If the answer to any of the above questions is no, revisit your segmentation strategy until you arrive at a model in which each segment is uniquely differentiated.

MINI CASE STUDY: BROCADE - FOCUSED SEGMENTATION STRATEGY

Networking solutions industry leader Brocade began their personalization strategy by focusing on one industry—healthcare—and on one web page—their home page. They featured banners to visitors from healthcare companies that guided them along a path of targeted healthcare content. In turn, Brocade saw a 144% increase in click throughs on the home page banner and a 53% reduction in bounce rates on the home page. By sending healthcare company visitors down a personalized path of relevant content, Brocade also saw a 36% increase in video views, a 46% increase in page views, a 86% increase in file downloads and a 26% increase in time on site.

Common Segmentation Mistakes to Avoid



Segmenting a segment

Targeting “auto manufacturers in California”, for instance, is probably not worth your while because geography isn’t really relevant. Your engagement efforts will scale much more readily if you drop the “California” and present similar messages to any auto manufacturer you target, rather than splitting hairs by geography. When trying to achieve scale, look for common messages that cut across the smaller sub segments and speak to the issues of the larger segment.



Overlooking universals

Segments should be mutually exclusive. If they share universals—the same values across attributes—they won’t be. For instance, if you only sell to enterprise organizations and define a segment using the length of a sales-cycle, the value of that attribute will always be long. If your definition of an attribute results in universal values across multiple segments, get rid of it.



Too many segments

Declaring that you’re going to go after dozens of segments in a differentiated way is impractical. Your segments will wind up being too small, you’ll have challenges creating differentiated messages and content for each, and you won’t be able to target effectively. B2C companies have more latitude in creating many rather than fewer segments because their audiences are much larger than those for B2B. While it’s not uncommon for a B2C retailer to define 10 to 12 customer segments, the average B2B typically focuses on 3 to 4.



Targeting all segments

Don’t lose focus on your best opportunities. Just because you’ve chosen company size as a key segmentation attribute, it doesn’t mean you have to go after enterprise, mid-market AND small business opportunities. Only go after the segments that represent look-alikes for your best customers.



Segmentation Worksheet 1

Identify the number of segments for each approach, their unique challenges and what your key messages might be for each. *A segment example has been provided to get you started.*

SEGMENT APPROACH	SEGMENT	KEY PAIN/CHALLENGE	KEY MESSAGE
Industry	Software & Tech		



Segmentation Worksheet 2

Determine which segments represent your best opportunities. Identify the key attributes, values and messages for each.

SEGMENT	ATTRIBUTE	VALUES	KEY MESSAGE



Segmentation Health Check

Use this check list to determine the viability of a segment.
Review for each group of accounts.

- Are your segments truly different in a meaningful way?
- Are your segments large enough?
- Do each of your target accounts fall clearly into one segment or another?
- Do more than one of your segments contain common universal values?
- Have you segmented a segment—sliced your opportunities too thinly?
- Are you planning to tackle more segments that you can manage?
- Do the segments you've chosen represent your best opportunities
- Can you make significant inroads into your chosen segments profitably?
- Do the segments you've chosen represent growth opportunities?
- Does sales leadership agree that these segments offer the best opportunities for your business?
- Do you have a process in place for iterating on or updating your segmentation strategy on a regular basis?

KEY SEGMENTATION TAKEAWAYS

- Focus on your best opportunities
- Start simply – one or two segments
- Segments should be unique in a meaningful way
- Segments should be large enough to provide scale
- Target accounts should fall clearly into one segment or another
- Don't attempt to segment within a segment
- Have alignment amongst all key stakeholders regarding your targets and segmentation strategy
- Stay abreast of current industry trends in order to demonstrate you know and care about what your customers care about
- Seek input from anyone in your organization that has a vested interest in making inroads into any of the segments you've identified.

2. CUSTOMIZING THE VISITOR EXPERIENCE

Thanks to leading B2C companies like Amazon and Netflix, today's B2B buyers want to engage with companies that provide highly-tailored ideas and information oriented to their specific business, industry, role and needs—in other words, **personalized**.

60%

Sixty percent of buyers believe personalization is valuable
(ITSMA)

10% - 30%

Up to thirty percent increase in the efficiency of marketing spend due to personalization
(McKinsey & Company)

5% - 15%

Up to fifteen percent in lifted revenues as a result of personalization
(McKinsey & Company)

Assess Your Content Inventory

Before you begin to layout your personalization strategy, it's a good idea to conduct an audit of your existing content. A content audit will help you inventory all of your usable assets, such as eBooks, whitepapers, images, video files, headline and body copy, etc. By identifying what you already have, you may realize that you don't have to create new assets; you may just need to organize them, based on the same attributes used to create your segments, and ensure that they can easily be found. Use this as an opportunity to evaluate two additional factors:



Is a piece of content past its shelf life?

A customer case study that is 2 years old should probably be updated or retired, whereas a Definitive Guide may still be current, or may require just minor editing.



Do you have assets that cover both your primary segmentation and the full buyer journey?

Even if you aren't segmenting by journey stage, it's still best to have a range of assets that cover awareness, evaluation and decision, as well as a mix of content types (video, webinar, white paper, etc.)

ASSET TITLE	AUDIENCE	CONTENT OWNER	DATE OF CREATION	TYPE OF ASSET	JOURNEY STAGE
Account Based Marketing for Financial Services	Financial Services Prospects, Customers	Product Marketing	January 2016	eBook	Awareness
The State of B2B Advertising for Financial Services	Financial Services Prospects, Customers, Partners	Digital Marketing	April 2018	eBook	Awareness
Case Study: Broadbridge Gains Clarity and Precision with Target Audiences	Financial Services Prospects	Customer Marketing	January 2017	Video	Evaluation
How to Create and Measure an Account-Based Marketing Strategy	All Industries Prospects, Customers	Product Marketing	March 2017	Webinar	Awareness
Unifying Your ABM Strategy with a Single Platform	All Industries Prospects, Customers, Partners	Product Marketing	February 2018	Webinar	Evaluation
Full Demo Demandbase Platform	All Industries Prospects	Consulting Team	August 2018	Webinar	Evaluation

Table 4. Example of a content inventory for a Financial Services industry segment. This is just a small sample—you should have 5-10 assets for each segment.

What's Working Now, What's not?

Use your web analytics to understand how your current content is performing and what types of content your B2B target audience prefers. Some areas of focus include:

- Where on the site is the asset currently located?
- What are the primary paths visitors are taking to get to the assets?
- Is the asset high-value?
- How has the asset been performing?
- What needs to be done to improve the performance of this asset?

Filling in the Content Gaps

With an inventory of current content complete, you can easily determine whether or not you need to create new, high-value content. Using the Financial Services industry example from table 4, the audit shows a mix of Awareness and Evaluation assets, but no late stage assets. This would be an area you would want to consider adding late stage cross-industry content.

ASSET TITLE	AUDIENCE	CONTENT OWNER	TYPE OF ASSET	JOURNEY STAGE
Vendor Selection Checklist	Cross-industry Late-stage Prospects	Product Marketing	TBD	Decision
ROI Case Studies (2)	Financial Services Late-stage Prospects	Customer Marketing	TBD	Decision
Account Based Marketing for Financial Services	Cross-industry Late-stage Prospects	Customer Marketing	TBD	Decision

Table 5. Example of content gaps

Site Customization: Start Simply

Based on our experience with hundreds of B2B companies, we've found that the simpler the personalized experience is, the better. A single change in the text or an image can have a significant impact on decreasing bounce rates and increasing time on site.

The first and most important step is to prepare, prepare, prepare. Discuss your web engagement strategy with your marketing teams, web team, product marketing team (for content and messaging), and other stakeholders. Often times companies begin their engagement strategies with small changes, like a shift in industry messaging, and see great success by simply adjusting the home page banner to be industry specific. For example, a different visual and/or headline for each of your target industries.

Customization Rules

With the Demandbase platform, it isn't necessary for a web developer to manually customize multiple versions of a single page for various audiences. You simply define rules within the platform that drive real-time customization based on which company has come to your site. This doesn't require extensive HTML knowledge and with the Demandbase plugin you're able to easily go to your website and identify what content you want to dynamically personalize.

We recommend you define your rules on paper in plain English (with input and consensus from your marketing, sales, web, and product marketing teams) before you begin to work with the Demandbase Site Customization tool.

IF VISITOR IS...	CHANGE THIS VISUAL...	CHANGE THIS TEXT...	CHANGE THIS CONTENT...
From a target hospital	Change banner image to hospital.png Replace Green Buildings Council logo with ASHE logo	Change tagline to: Cost. Efficiency. Savings.	Replace generic case studies with: Chase Medical case study Good Samaritan case study

Table 6. Example of customization rules for a website for a fictitious building automation provider (ABC Building Automation). The primary target segments for this company are hospitals and universities.

Site Customization Examples

ABC Building Automation

Comfort. Efficiency. Savings. For any business environment.

ABC Building Automation help building owners make commercial environments more comfortable and safe for occupants, while enjoying the benefits of increased efficiency and energy cost savings. Intelligent buildings are just the way of the future – they're here today. Whether it's lighting, HVAC and security systems, you can count on us to meet all of your building needs.

Case Study
XYZ Corp saves \$15,000 per year through greater energy efficiency. Read now.

Case Study
PQR Group reduces building humidity. Read now.

New Research
Impact of intelligent automation on occupant employees. Read now.

Lighting HVAC Security

IFMA

About ABC Contact

Image 1. ABC's website uses a template that defines the placement of the individual page elements in addition to overall branding. Using a pre-designed layout allows you to place custom imagery and text into the designated page elements, or widgets.

ABC Building Automation
 Comfort. Efficiency. Savings. For any medical environment.

ABC Building Automation help building owners make commercial environments more comfortable and safe for occupants, while enjoying the benefits of increased efficiency and energy cost savings. Intelligent buildings are just the way of the future – they're here today. Whether it's lighting, HVAC and security systems, you can count on us to meet all of your building needs.

Case Study
 Chase Medical saves \$15,000 per year through greater energy efficiency. Read now.

Case Study
 Good Samaritan Hospital reduces OR humidity. Read now.

New Research
 Impact of intelligent automation on hospital staff and patients. Read now.

ASHE
 IFMA

About ABC Contact

Image 2. This example shows ABC's website customized for hospitals with an updated header image, tagline and content.

Multi-Channel Customization

A B2B buyer's journey is rarely linear. It's important to deliver a consistent message from ads, to landing pages, to web pages.

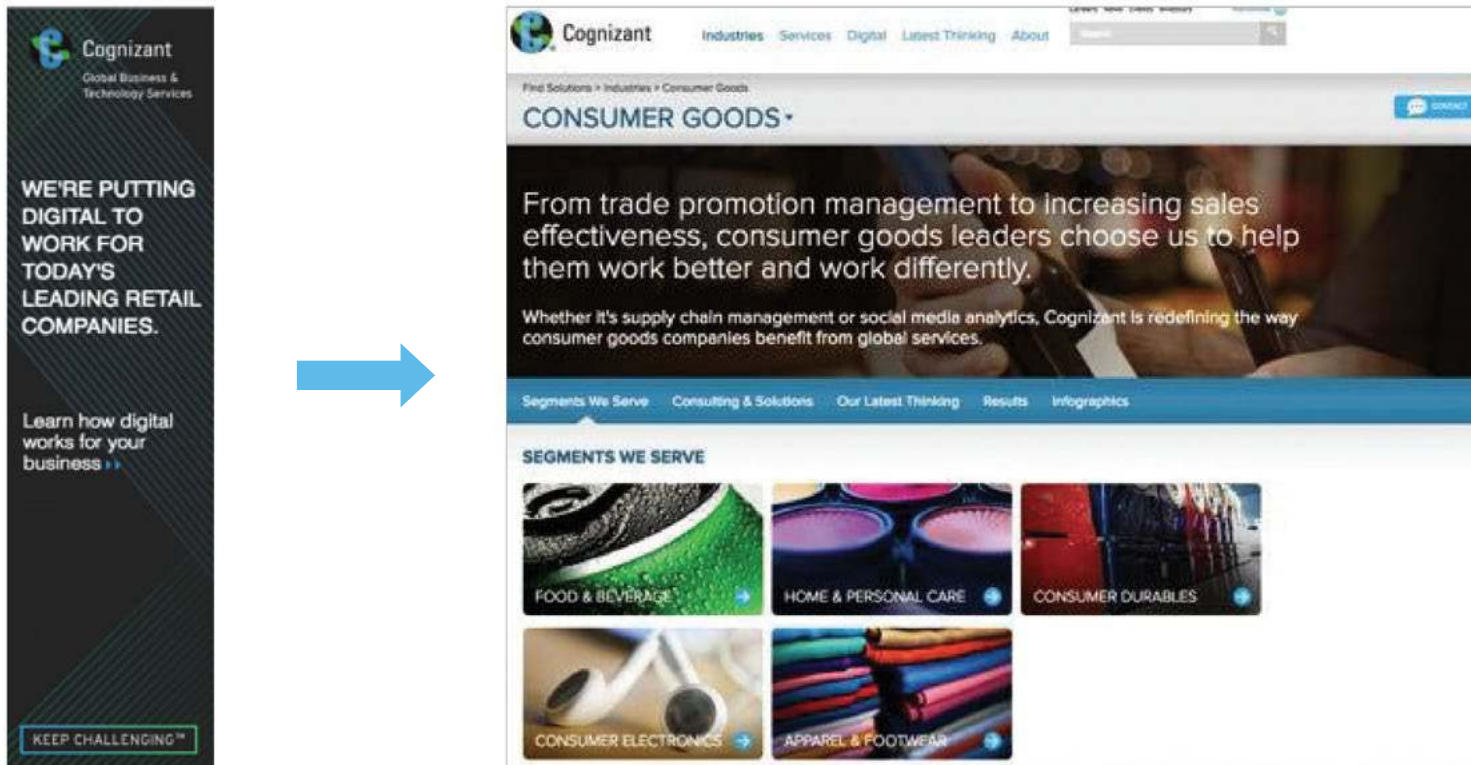


Image 3. Example of ad-to-landing page

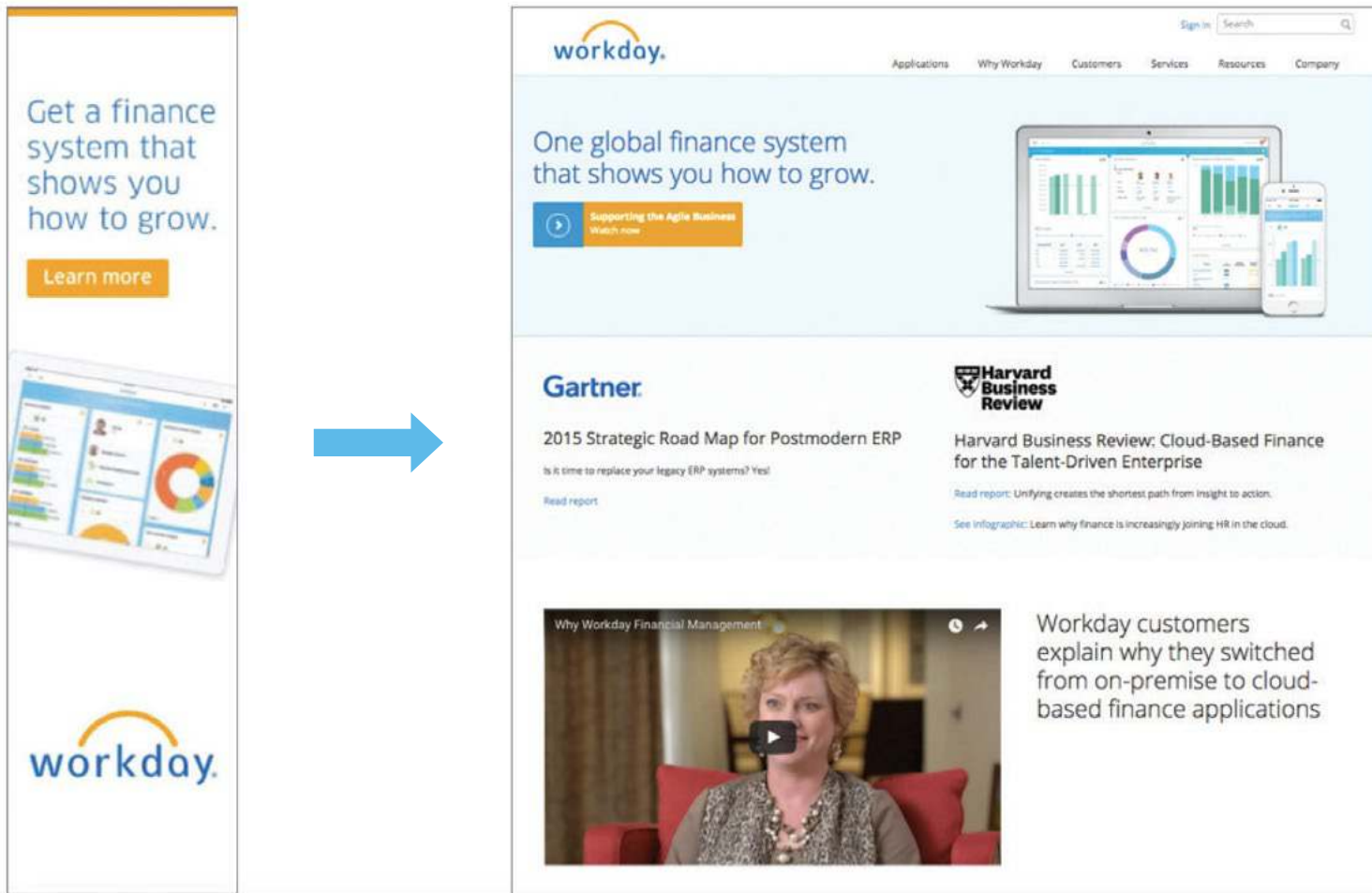


Image 4. Example of ad-to-landing page



A screenshot of the Demandbase website. The page title is "7 ways the mobile consumer changes everything". The article text discusses mobile commerce trends, such as the increase in mobile purchases and the impact of online reviews. It includes a list of three key points: "How online reviews help mobile shoppers buy more", "How the holidays permanently change mobile shopping habits", and "Where mobile purchases actually happen". Below the article is a "Share this page" section with social media icons for Twitter, LinkedIn, Facebook, and YouTube. There are also sections for "You may also like" and "FEATURED WEBINAR". On the right side of the page, there is a green sidebar with the heading "Get the whitepaper" and a form to download the whitepaper, including fields for First Name, Last Name, Job Title, Email Address, and Company Name, followed by a "Download" button.

Image 5. Example of an ad-to-conversion page engagement

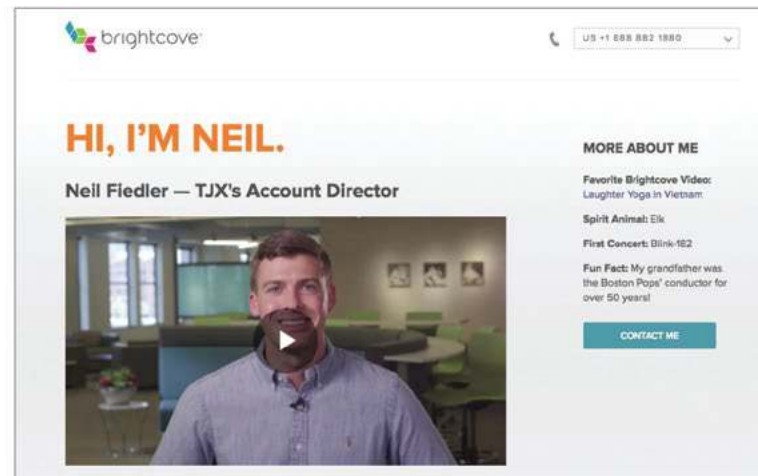


Image 6. Example of an ad-to-onsite web personalization

Company Name, or No Company Name?

That is the question we discuss with many Demandbase clients and there is no definitive answer. Some customers have seen a lift in engagement when using customer names as part of their personalization strategy, especially in advertising. Others consider it to be “creepy” especially if a visitor has not identified themselves by completing a form.

At Demandbase, we don’t recommend that you use company name unless you are certain your data is accurate and you test it with a small segment before scaling across your site. A few areas where you might consider testing it include:

- Tied to customer login
- Thank you page after a form completion
- Homepage welcome for your best customers
- Personalized advertising

Reduce Form Friction

Today, with the shift to buyer control and centrality, forms have become a friction point. Web visitors simply don’t want to fill them out. They’re too long, they interrupt the visitor’s search for information, they’re repetitive, and they are error prone – suddenly everything you just entered disappears. When visitors do complete a form, the information is often false.

Demandbase Engagement solution reduces form friction by appending data in real time to a visitor’s form. An optimized form might ask for 3-4 basic questions, such as the visitor’s name, email address and phone number. Demandbase then appends more than 40 firmographic data attributes including the visitor’s company affiliation, mailing address, revenue and other data points. The benefits of this approach include more form fills, triple-verified company identification, and a more manageable database with standardized and normalized data.

*For each field eliminated
conversion rate increases 8.5%*

The diagram illustrates the process of reducing form friction. On the left, a 'SIGN UP' form is shown with 13 input fields: Full Name, Email, Title, Phone, Company, Industry, Address, Website, Revenue, and Number of Employees. Below the fields is a checkbox for 'I agree to the Terms of Service & Privacy Policy' and a 'SUBMIT' button. On the right, the same form is shown, but with a 'DEMANDBASE' overlay that pre-fills the 10 firmographic fields (Company, Industry, Address, Website, Revenue, and Number of Employees). The user only needs to fill out the 3 remaining fields (Full Name, Email, and Phone) and click the 'SUBMIT' button. A blue arrow points from the original form to the optimized form.

Personalize Chat Sessions

Live chat can help build trust with buyers by providing subject matter expertise at the point of engagement. Chat personalization can be as simple as acknowledging a client by name, or a bit more advanced, aligning the chat experience to where the visitor is on your site.

20%

Conversations increase by twenty percent due to personalized chats
(Forrester)

3X

Customer are three times more likely to buy as a result of personal chats
(Forrester)

305%

Return on Investment when implementing personal sales chats
(Insite Software)

120%

Return on Investment as a result of customer service chats
(Insite Software)



Home page chat bot
(Awareness)



Blog chat
(Education)



Solution page chat
(Decisions)



Customize Worksheet 1

Assess your content inventory. A segment example has been provided to get you started.

ASSET TITLE	AUDIENCE	CONTENT OWNER	DATE OF CREATION	TYPE OF ASSET	JOURNEY STAGE
ABM for Financial Services	Financial Services, Prospects, Customers	Product Marketing	January 2016	eBook	Awareness



Customize Worksheet 2

Assess the performance of your current assets. *A segment example has been provided to get you started.*

ASSET TITLE	WEB LOCATION	VALUE	GATED	TRAFFIC SOURCE	PERFORMANCE OF ASSET	AREAS FOR IMPROVEMENT
ABM for Financial Services; Building a Framework	www.demandbase.com/ebook/account-based-marketing-for-financial-services	High	No	Display	125 clicks 100 downloads 45 pipe	Update front cover and display ads to images that reflect the financial industry

3. MEASURING ENGAGEMENT SUCCESS

It's impossible to measure the success of your engagement activities without establishing a baseline of the current level of activity within your chosen segment. A baseline is a metric you establish which provides a foundation for making comparisons of past performance to current performance.

When you first start out, it is important to establish baselines for each of these fundamentals. Some examples could be, page visits from target accounts, percentage of visits that are coming from your Ideal Customer Profile, or number of unique, active users on your site.

Like high blood pressure is a leading indicator for heart disease, and aerobic activity is a leading indicator for heart health, engagement metrics are leading indicators for positive business outcomes. Engagement metrics are mid-funnel, forward-looking diagnostics that provide a look at how you are likely to perform down the road at the bottom of the funnel.

Measuring engagement alone is not enough. Customers who open emails at a higher rate, bounce less often and view more pages on your site are great—but not as great as customers who make it through the sales funnel faster, spend more, and remain customers for longer periods. It's critically important to be able to make the link between your personalization efforts and actual business results. Unless you're able to tie your personalization efforts to real business outcomes like higher closing ratios, bigger deal sizes and increased funnel velocity, your personalization success stories will fall on the deaf ears of your business' leadership team.

Here's a handy list of business outcomes that your leadership team is sure to get excited about if you measure your personalization strategies against them:

- Sales revenue
- Average deal size
- Funnel velocity
- Renewal \$
- Cost/inbound opportunity
- Upsell \$

MINI CASE STUDY: BRIGHTCOVE - BUSINESS OUTCOMES

Brightcove, a pioneering force in the world of online video, helps thousands of customers to leverage the unmatched power of video to educate, inspire, entertain, communicate, and move their business in meaningful ways. Brightcove tapped personalization to deliver unique, industry-specific messages that were differentiated based on whether site visitors were coming from customers or prospects. Their personalization strategy coupled with ABM-focused sales and marketing alignment resulted in the scheduling of 86 meetings, and an additional \$200K in opportunity pipeline.



Engagement Worksheet 1

It's impossible to measure the success of your engagement activities without establishing a baseline of the current level of activity within your chosen segment.

Pick a time period that offers enough historical data, then use that for comparison purposes moving forward. For example, use Q1 to establish your baseline and then compare your Q2 results to the Q1 baseline.

METRIC	SOURCE	BASELINE	Q1	Q2	Q3	Q4
Page views						
Page views/sessions						
Sessions duration						
Bounce rate						
Conversion rate						
Returning user rate						

4. ALIGNING RESOURCES & DEVELOPING WORKFLOW

Recall that ABM focuses on your best opportunities, supports sales' reality, provides customer-centric experiences, and connects marketing to revenue. As such, the practice of ABM is a marketing team sport, involving all key roles in the marketing department. While operationalizing your web engagement strategy will mostly involve your web development and/or digital marketing team, engagement is best approached as a part of a greater ABM strategy rather than in isolation.

ROLE	AUDIENCE	CURRENT OWNER	TYPE OF ASSET
Marketing ops/ analytics	Implement tracking process Baseline key metrics	Gather key metrics and report KPIs and insights weekly	Revise: funnel model, forecasts, goals
Sales & mkg leadership	Agree on targets Apply segmentation Build audiences	Provide target account web engagement data to sales weekly. Receive sales outreach updates weekly	Revise: Target account list, Segmentation strategy, Sales and marketing alignment practices
Digital Marketing	Personalize high value pages by segment Optimize forms Optimize content offers	Go live with personalized pages, optimized forms and content offers	Revise: Personalized experiences, Form, content optimization
Campaign Owners	Develop targeted content and messages Develop segmented campaign creatives	Enable sales with campaign insights and resources for action	Revise: Creative, Content

Table 7. Example of how successful practitioners typically divide and conquer



Workflow Worksheet 1

Align your resources using the below worksheet. See *Table. 7 for example*

ROLE	AUDIENCE	CURRENT OWNER	TYPE OF ASSET



Operationalizing Your Engagement Strategy Checklist

Use this check list to bring your ABM initiatives— including engagement—to market:

- Finalize target account list with sales leadership.
- Finalize segmentation strategy, identify the segment attributes you'll speak to, and the key messages you'll put in market for each (*Hint: Limit your personalization efforts to 3 to 4 differentiated experiences*).
- Determine whether you will increase awareness, engagement or conversion for each segment
- Identify creative and web development resources needed to execute.
- Define goals and how you'll measure success for your personalization strategy.
- Identify target pages for personalization (*Hint: Start with the home page, forms and/or other key conversion pages, e.g., content download or contact pages. Begin with 2-3 target pages max*).
- Develop creative strategy (*Hint: combine themes, key messages, calls to action and imagery for maximum impact*).
- Assemble new assets for each new personalized experience and develop, deploy and test personalized pages.
- Run personalization plan for a defined test period and measure results
- Identify areas for improvement and develop hypothesis
- A/B test improvement hypotheses, measure results, implement those that achieve the best results.
- Scale optimized personalization across additional segments and pages (*Hint: optimize the experience from "click to close", e.g., repeat/reinforce messages across each page in the experience path*.)

READY? LET'S GO!

Now that you know how to think about driving engagement, the question is “how do you do it?” It’s easy with Demandbase Engagement Solution. Use this playbook to define your audience segmentation strategy and plan your approach to personalization. Don’t try to boil the ocean. Start with one or two segments (industry or company size) and a home page personalization experience. Demandbase can help you curate a customized experience and use Artificial Intelligence (AI) to recommend the best content for each visitor. As your maturity evolves, you can expand to more advanced segmentation and personalization strategies. Make sure you create baselines and measure often.

[Learn more about how Demandbase can help you engage your target accounts.](#)

THANK YOU!



DEMANDBASE

Demandbase is a leader in Account-Based Marketing (ABM). The company offers the only Artificial Intelligence-enabled, comprehensive ABM platform that spans Advertising, Marketing, Sales and Analytics. Enterprise leaders and high-growth companies such as Accenture, Adobe, DocuSign, GE, Salesforce and others use Demandbase to drive their ABM strategy and maximize their marketing performance. The company was named a Gartner Cool Vendor for Tech Go-To Market in 2016. For more information, please visit www.demandbase.com or follow the company on Twitter [@Demandbase](https://twitter.com/Demandbase).