



Tactile Marketing Automation[®] ABM Playbook

This guide is for you if:

- You understand the basics of ABM and want to put it into practice.
- You have or will acquire customer data to inform your outreach.
- You want to use a multichannel strategy for maximum effectiveness.

Introduction

Account-based marketing, or ABM, has earned its place as a leading strategy for engaging audiences and driving business success. ABM has taken what we thought we knew about marketing and turned it on its head:

Before ABM

Sales and marketing teams function independently.

The audience is undefined, and the team casts a wide net of outreach.

Brand messaging is sent out based on the goals of individuals or teams.

Communication channels are siloed from each other and from your customer data.

Customer journeys are inconsistent at best, often taxing to execute, and difficult if not impossible to track.



After Adding ABM

Sales and marketing teams coordinate strategies to combine sales' customer knowledge with marketing's campaigns.

The audience is specified, and **target accounts fit an ideal customer profile.**

Brand **messaging is sent out strategically** based on the recipient's interest and availability.

Content for all channels is developed and **informed by customer data**, and the **channels work together** to create a personalized, holistic experience.

Customer journeys are orchestrated and **tracked from end to end** thanks to sales and marketing alignment and the use of orchestration software.



At PFL, we've been practicing ABM for years and have learned through continual improvement which tactics work for us and our customers. This booklet is a collection of best practices that lead to ABM success.

What you can find in this guide:

1. Battle-tested ABM plays with outlines for who to contact and why.
2. Tactics to ensure your account-based marketing starts on the right foot.
3. Sample cadences for sales and marketing teams to start executing ABM plays.
4. Real-world examples of each play in action.



Orchestration and ABM: An Overview

Practicing ABM without orchestration is like putting an orchestra on stage without a conductor, a program, or even sheet music. The musicians will be able to deliver something vaguely like a concert, but the listeners will hear each sour note. When the planning and strategy are there, though, the audience will witness a remarkable performance.

Just like with an orchestra, excellent ABM has some basic requirements. To achieve success, you need a plan, processes, the right people, and the right tools. You need orchestration.

Orchestration Defined

At PFL, we define marketing orchestration as the coordination of data, processes, sales teams, marketing teams, and campaigns by using automation to optimize multichannel engagement, ultimately delivering a personalized experience with a brand.

That's a mouthful. To put it simply, orchestration means end-to-end, data-driven marketing, with all parts working in harmony.

When you orchestrate ABM, you can deliver a cohesive, relevant message to your target accounts. These experiences build trust and relationships, both of which are essential to advancing your sales cycle.

Orchestration 101

Here are a few of the basics you need to know to start orchestrating your ABM plays.

What tools do I need for orchestration?

You need a CRM or marketing automation software that is your system of record for contact and account data.

You also need dedicated channel orchestration software. PFL's Tactile Marketing Automation® (TMA®) solution natively integrates with your existing CRM or marketing automation software to help you orchestrate offline channels with digital channels. TMA enables multichannel customer journeys, personalization, campaign tracking, and detailed analytics. Align your CRM marketing intelligence with your direct mail efforts to build personalized tactile experiences.

Top Tools for ABM

Below are a few of our favorites but there are many tools to consider.



for launching role-based ads



for conversational marketing



for context-based content marketing

How do I launch a play in an automated system?

Use data signals to determine the right moment for engaging a contact. Data triggers ensure that your marketing is relevant and meaningful because they're based on the contact's needs rather than yours.

Triggers can be based on static data (such as a birthday), single events (such as attending a webinar), or an engagement score. An engagement score is a running tally of a contact's engagement activities. When a contact reaches a scoring threshold, it sets off a trigger for specific marketing outreach to begin.

Also, it doesn't have to be automatic. You can always add a contact to a campaign at will.



This guide

includes modifiable cadences for each outlined ABM play. The channels described here include web ads, email, phone calls, direct mail, and events. Depending on your business and audience, you may also use other channels.

How do I use channels effectively?

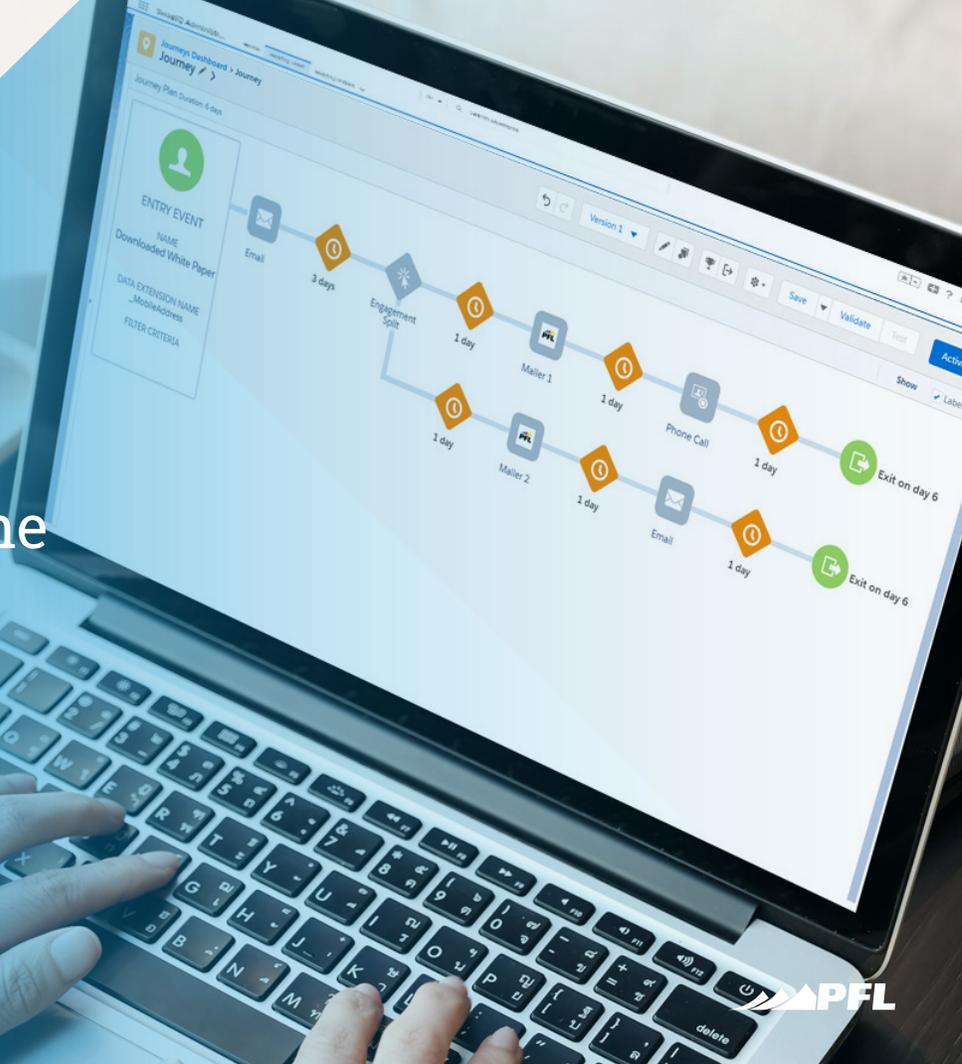
A strong multichannel mix means your sales reps are more likely to hear "Yes, I've heard of you" than "Wait, who are you?" Although each marketing channel has its inherent weaknesses, using them in a unified manner to tell a relevant, meaningful story makes each channel more effective. Channel orchestration is a hallmark of a great ABM strategy.

According to the [2020 State of Multichannel Marketing Report](#) that we conducted with Demand Metric, surveyed marketers indicate greatest success when they use 4 to 6 channels.

4 to 6

Marketers who use 4 to 6 channels in their multichannel campaigns report the best response rates.

State of Multichannel Marketing Report – Demand Metric & PFL, 2020



The Benefits of Orchestration with TMA

Direct mail is an effective and powerful channel in its own right, but just as other channels like email and ads are not inherently orchestrated for ABM, neither is direct mail. Tactile marketing automation takes direct mail to the next level by coordinating it with other channels as a part of your overall ABM campaign.

Personalization

According to HubSpot's 2020 Not Another State of Marketing Report, "the most common challenge with ABM is delivering a personalized experience." Personalization doesn't have to be hard, though. When you integrate tactile marketing automation with your tech stack, your contact and account data can inform automated triggers for direct mail, which piece to send, and even the personalized info within the content.

Campaign tracking and notifications

Because PFL fulfills your orders in-house, you get complete visibility into your campaign from start to finish. When your packages reach your recipients, we provide alerts within 15 minutes of delivery so your sales team can make a timely phone call.

Analytics

PFL's TMA solution uses the reporting engines in your CRM or marketing software to give you insights into your direct mail programs. Optimize the journey, execute it, review the results, and repeat! Continuous improvement means you're always increasing ROI and driving revenue.

The Journey Starts Here

The next level of marketing happens when you orchestrate all your channels. Your ad can connect to an ebook download that triggers a personalized package that's followed by a phone call. When you reach that level, you create remarkable customer experiences.

The remainder of this guide outlines several ABM that plays will help guide you on your path.

The Warm-Up



Stage

Awareness Stage, Early Sales Funnel



Target

Influencers, Decision Makers



Goal

Engage prospects at target accounts

After you determine that an account fits your ideal customer profile, plan a strategic outreach. Rather than going straight to a cold call, marketing needs to generate interest before your business developers ever touch a phone. Then your reps can spend less time wheeling for a few spare minutes and instead start a conversation around business needs and your brand value.

Orchestrate a multichannel journey that warms up your contact and leads into the start of that conversation:

- Ads** | Targeted ads develop memory and recognition. When clicked, they also become data that can inform and trigger relevant paths on the customer journey.
- Email** | Early stage emails are much like ads with the addition of being more personalized and direct.
- Direct Mail** | Direct mail transforms your brand from a distant, theoretical idea to something real and tangible. This is marketing that they can hold, open, and pass around, that also delivers powerful messaging and calls to action.
- Phone** | Your business developer should be knowledgeable about the materials already sent and should have prepared talking points.

For this early stage, each channel needs to clearly state what you do. The story in these pieces should be cohesive, compelling, and — most of all — *memorable*.

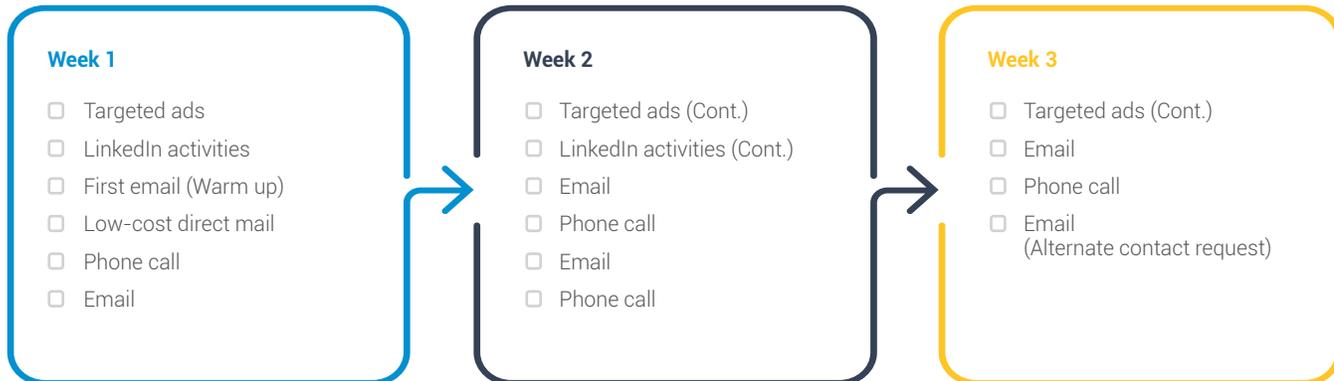
How to Make the Play

You're targeting influencers and decision makers. It would be great if you could target champions, but it's unlikely that you know the ideal person or people to champion your brand. Part of the strategy here is to gather intelligence, and the discourse will eventually lead to either discovering or evangelizing a champion.

Hold off on contacting executives until a later stage after you've already created a positive buzz about your brand. Begin your relationship with the influencers, so they can do some influencing on your behalf.

Outreach Cadence

Here's a potential map for an outreach cadence to warm up your contacts:



31%

Digital can increase direct mail response rates by 31%, and direct mail can increase digital response rates by 10%.

US Lead Generation Agency Industry, Marketing Commentary 2019



Outcome Strategies

Desired Outcome Not Achieved

If the contact fails to engage with you, here's what you can do:

- > In a final email, request an introduction to a more appropriate contact.
- > Enable the business developer to add other contacts to the stream.
- > Reassess whether your messaging is relevant. Refresh the content as needed.
- > Adjust your strategy. Put the contact in a different nurture stream and continue displaying targeted ads to stay top of mind. This is preparation for a more opportune moment.
- > Give the business developer an automated reminder to check on the contact again at a later date.

Desired Outcome Achieved

If you see early indicators of success, such as email opens and click-throughs, **increase your outreach efforts.**

If your contact reaches your predetermined engagement threshold, **move them forward into the next play.**



Tip

Make sure the earlier emails in this cadence are especially personalized. Final emails in the sequence can be more automated.

Example Play

Arxan

 **Stage**
Awareness Stage, Early Sales Funnel

Arxan, a cybersecurity technology company, needed to warm up their target audience in the tech software industry. The marketing team used direct mail as an integral part of their outreach.

Based on data, they decided to reach out to mid-level managers as the most likely to become influencers in favor of the Arxan brand. To help these managers realize the risks to their applications, the Arxan team developed a brief questionnaire with only nine Yes-or-No questions, as well as educational information. They sent the questionnaire along with an attractive, branded pen via FedEx.

Thanks to PFL's integrations with FedEx, Arxan received notification of delivery within 15 minutes of the package landing, so they could immediately follow up with a timely phone call.

When the individual answers "Yes" to most or all of the questions, talking about security risks becomes easy!



"The sales team loves it. They're really happy to use it because it helps get the conversation started."

Tiffany Early, Arxan Senior Director of Marketing



Engagement Booster



Stage

Engaged Stage, Mid-Funnel



Target

Influencers, Decision Makers, +/- Executives



Goal

Increase enthusiasm and land a meeting

When you see signs of engagement from your targeted contact, it's time to hit the accelerator. People get distracted easily, so give them solid reasons to pay attention to you. Now is the time to hit them with your brand's promise and capabilities. Don't stop there, though. That's the bare minimum.

With high-value accounts, personalization isn't just important — it's critical. Get more engagement by going the extra mile:

- > **Offer up-front value** that fills an existing need. Demonstrate that you're reliable and useful even before trying to sell something. Some examples include ROI calculators, tip sheets, and industry-specific data.
- > **Create custom content** that resonates with groups within the account. Examples of this include landing pages, ebooks, blog content, and other educational pieces that match this audience's needs.
- > **Speak to each decision maker's goals** and show how you help achieve those goals. For example, your messaging is different if the decision maker is focused on reducing costs rather than driving revenue.

If this sounds like a lot of effort, that's because it is. It's also what makes ABM powerful and effective. You wouldn't go to these lengths for an account that wasn't a true whale for your brand.

Always be clear that your audience's call-to-action is to book a meeting!

How to Make the Play

At this stage, you should have more data on contacts. Use that data to make your marketing personalized. Did the contact click on a link to a blog post? Send more content related to the topic of the blog. Did they take a self-assessment quiz? Share info about how to improve their results or what their business strategy is missing.

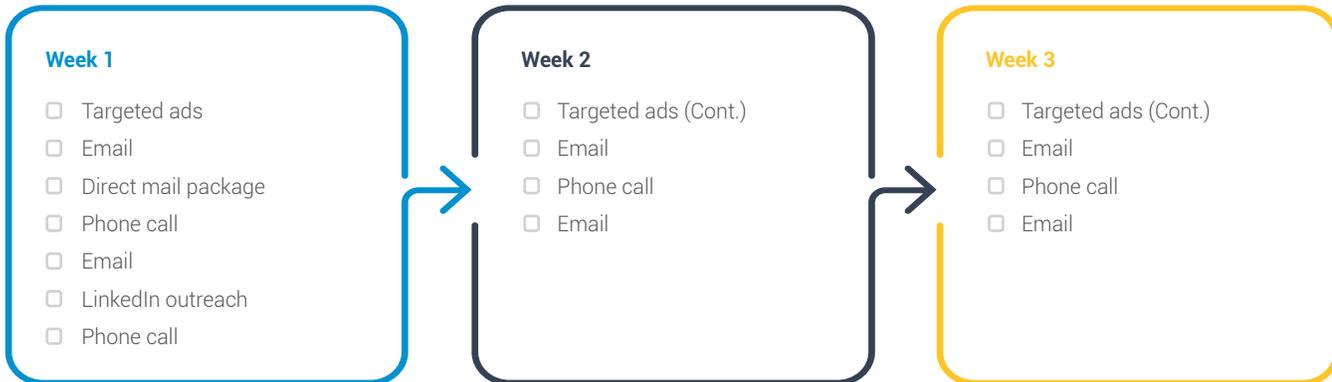
Executives may or may not be among your targets. If you target them, be concise and relevant.

Potential data triggers for initiating this play:

- > Contact attended a webinar
- > Account score threshold reached
- > Contact visited a key web page

Outreach Cadence

To help accelerate engagement, you need heavier outreach:



Outcome Strategies

Desired Outcome Not Achieved



If you received a “no,” your action depends on the reason behind the denial:

- If the budget isn't available, determine a timeline for reaching out again later.
- If they just signed a contract with a competitor, find out the length of the contract. Reach out part way through the contract and gauge their level of satisfaction.
- If they simply lack the time or resources, place them in a slow-drip nurture stream.



If you didn't receive a response to meeting requests, here are some options:

- Follow same steps in the preceding play: try identifying a more appropriate contact and re-evaluating your message for ways to make it more compelling.
- Find a way to make the meeting more appealing. Taking the meeting might be more attractive if you can involve someone higher up than the business rep.
- Engage in long-term light touches. For instance, keep an eye on news about the company and reach out if the company achieves a milestone.



Tip

Segment the contacts into groups based on their interests so that you can automate your outreach. This is how you can achieve personalization at scale.

Desired Outcome Achieved

You've landed a meeting! Do your homework, learn everything you can about the person/people you're meeting, and double down on researching their company.



Tip

Give your sales reps a standard list of information to gather. The details they collect will help you personalize future marketing content.

Example Play

Okta



To set meetings with C-level IT contacts at their biggest ABM target accounts, Okta used a cleverly designed box. Each box contained a personalized video that spoke to each company's specific pain points and initiatives.

PFL's solution made it possible for Okta to automatically populate the physical note card that accompanied the video with account-specific details and a custom landing page URL, ensuring prospects received a highly personalized experience.

The pilot program drove a **73% month-over-month increase** in web traffic from target accounts and a **40% conversion-to-meetings rate**.



“Our personal video mailers opened up opportunities to start positive conversations with our biggest accounts and c-level prospects.”

Maureen McCormick, Okta Named Accounts Marketing Manager

Opportunity Advancement



Stage

Opportunity Stage, Mid-Funnel



Target

Decision Makers, Champions, Executives



Goal

Secure buy-in and move the deal forward

After an account converts to a sales-qualified lead, casual marketers may back off and let sales take over. Sophisticated marketers, on the other hand, lean in. Now is the time to expand your reach within the account, connecting with leadership and identifying a champion.

Not only do you need to get more people involved, you also need to get them excited about what your product can do for them. You can accomplish that through education and proven value:

- > **Share detailed case studies that are relevant to the account and/or the contact.**
- > **Provide reviews and customer testimonials.**
- > **Learn their business use cases, address them, and educate your contacts about use cases they may not have considered.**

The content you present needs to give them the confidence that your product works.

How to Make the Play

The personas you are contacting in this play are varied and require different outreach strategies. That might seem challenging, but tactile marketing automation makes it easy to segment your audience and orchestrate your digital and tactile marketing.

At this stage, you should identify your champion. This is the individual who will help drive your case internally. Think of ways to arm your champion so they can better build your case.

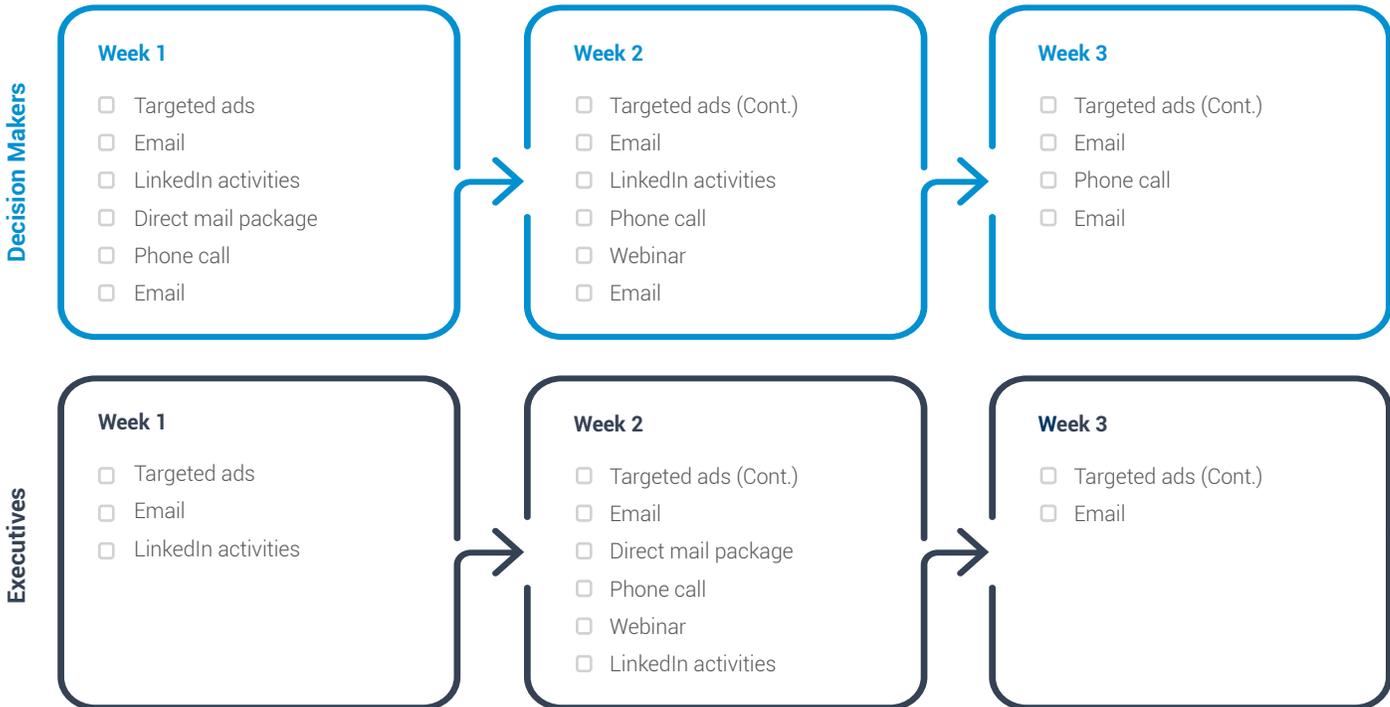
You can also bring the executives into the outreach plan. Executives are the most sought-after contact by marketing, so make sure you're using the right channels for outreach. According to the [2020 State of Multichannel Marketing Report](#), the two most effective channels for reaching executives are events and integrated, personalized, and branded direct mail.

Always make your content personalized and relevant to the persona!



Outreach Cadence

The personas are vastly different, and you need to approach them with those differences in mind. Executives are very busy, and your outreach to them should be lighter and even more direct.



Outcome Strategies

Desired Outcome NOT Achieved

If the critical stakeholders do not engage or engage but show reluctance, here's what you can do.

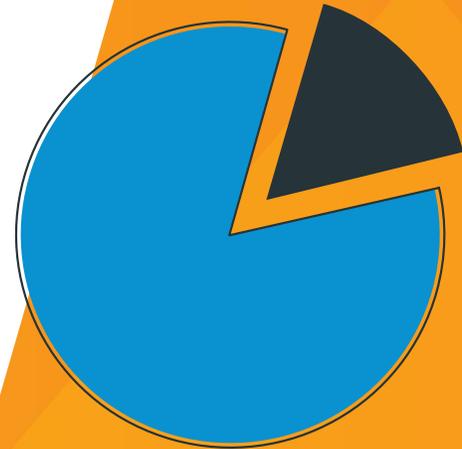
Identify which personas you still need to win over. Are there trends to their reluctance or objections? Change your messaging to address those issues.

Leverage your champion(s). Find out what needs to be done to achieve buy-in.

Bring higher-level people at your own company into the conversation as needed. For instance, you might need to facilitate a CMO-to-CMO conversation or an IT-to-CTO meeting.

Desired Outcome Achieved

Because you have stakeholder and executive buy-in, your timeline and path to closing should become even clearer. Go win that deal and move onto the next play – welcoming a new customer!



Example Play

PFL



Here at PFL, direct mail is a natural part of our outreach. (It's what we do!) When an account reaches the Opportunity stage, PFL's Greatest Hits keeps the conversation lively. It's packaged like a record, but it's actually a book filled with case studies that prove the effectiveness of direct mail.

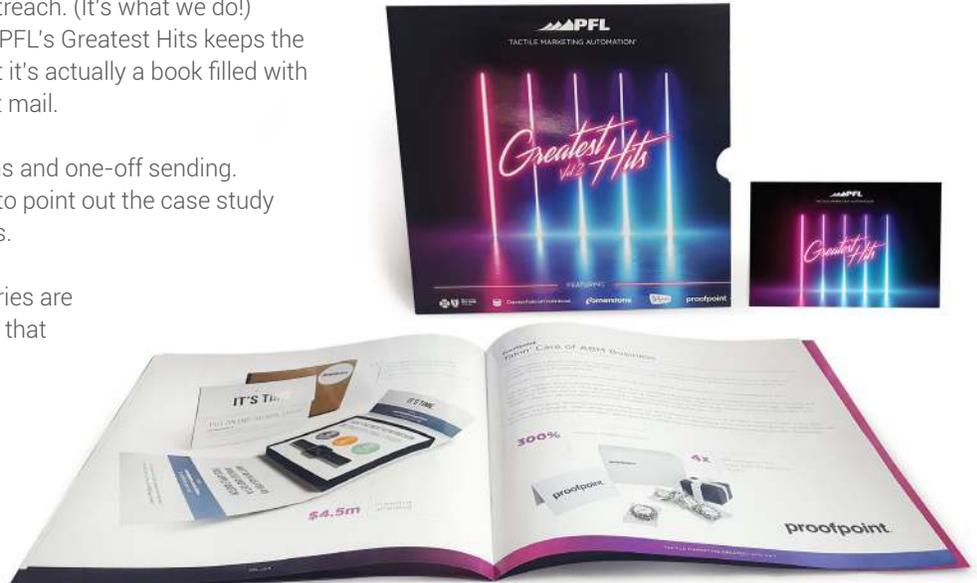
For us, this kit is a great option both for campaigns and one-off sending. Account executives can customize the note card to point out the case study that would be of greatest interest to their contacts.

We regularly update this kit to ensure that the stories are fresh and targeted to the personas and industries that we're targeting.



"The sales team loves the Greatest Hits kit. It's eye-popping and has an unusual shape, which instantly draws attention. The stories and statistics in the book make it easy to point out just how much value we have to offer."

Eva Jackson, PFL Director of Demand Generation



Welcoming New Customers



Stage

New Customer, Early Post-Sale



Target

Decision Makers, Executives,
Managers, Trainers, End Users



Goal

Express gratitude for the opportunity, drive onboarding success, or increase adoption

After you close a deal and launch a new partnership, ABM can help you establish a foundation for ongoing success. Keep the customer journey alive and engaging all the way from purchase to renewal or any other purchase decision.

The welcoming play is in many ways “choose your own adventure.” What you choose to do depends heavily on your product and objectives. For a largely transactional sale, simply expressing thanks is appropriate. When launching long-term projects or software, you can either help with training or pump up the excitement for end users so they adopt your product.



How to Make the Play

This list has a lot of roles on it, but the personas you're contacting depend on your objective. Also, the personas might overlap. For instance, managers might double as trainers, some end users might be designated as trainers, or the C-suite might be the end users.

Outreach Cadence

The personas are extremely different, and the goals for this outreach vary considerably based on who you're talking to. What sparks interest for a trainer probably isn't going to be the same as what an executive might react to. You need to approach this outreach sequence with those differences in mind.



Expressing Gratitude: Decision Makers, Executives, Managers

Thank You Campaign

Week 1

- Direct mail letter or package
- Phone call
- Email with tips

Week 2

- Email with a review request or customer satisfaction survey



Onboarding Instruction: Managers, Trainers, End Users

Onboarding Campaign

Week 1

- Direct mail with onboarding materials
- Phone call
- Email with tips
- Newsletter

Week 2

- Email
- Webinar on training topics

Week 3

- Newsletter
- Email with onboarding progress survey



Increasing Adoption: Managers, End Users

Adoption Campaign

Week 1

- Targeted ads
- Email
- Direct mail package
- Phone call
- Newsletter

Week 2

- Targeted ads (Cont.)
- Email
- Webinar on success stories
- Email

Week 3

- Targeted ads (Cont.)
- Email with a review request or customer satisfaction survey
- Phone call follow-up

Outcome Strategies

Desired Outcome Not Achieved

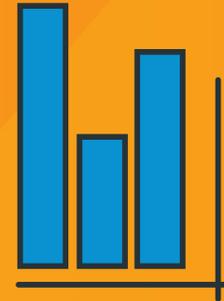
This section is not applicable if you simply thanked or welcomed your new customer. In case onboarding or adoption statistics do not improve, try these strategies:

- > Investigate obstacles that are blocking the progress. Do you need to win over end users? Run a special outreach program to engage them, sharing testimonials and guides.
- > Hold conversations with leaders and managers about how to get value from your product.
- > Host special training sessions or webinars.

Desired Outcome Achieved

If your new customer journey is successful, the result is greater customer satisfaction and a shorter time for the customer to achieve ROI. The sooner your customer is seeing a return on their investment in your brand, the stronger your case is for continuing the partnership.

Be aware, though, that any initial honeymoon phase might wear off. Keep a finger on the pulse of the users, and if adoption declines, be ready to recapture attention. You not only need to get people excited about your brand but also keep them that way.





75%

of respondents saw an improvement in customer retention rate when using an ABM approach.

2019 TOPO Account Based Benchmark Report

Example Play

PitchBook



PitchBook, a financial data software company, wanted to drive adoption of their software immediately after launching with new customers. The marketing team decided to experiment with sending welcome kits using the PFL solution. After performing rigorous A/B testing, they launched a US-based kit for welcoming new customers.

The kit includes a personalized note card, a Yeti mug, and a detailed story about how the individual who funded Yeti used PitchBook to make the funding decision.

The results? Users who received the kit showed:

- **47% higher activity with the software**
- **75% increase in profile views within the software**
- **211% increase in downloads of the Google Chrome extensior**

The kit was so successful that the marketing team expanded it to EMEA.



More ABM Plays

The preceding plays are a few of the many strategies for creating orchestrated, multichannel journeys. They're also just the tip of the ABM iceberg.

Here are more ways to increase engagement and unblock stalled opportunities:

Re-Engage Stalled Deals

Do your due diligence to uncover obstacles, such as budget or your competition, and then open a conversation to show you care and explain how you can help.

Land and Expand

After landing a division within a large account, capitalize on that success. Make connections in other divisions and use results as irrefutable proof of concept.

Promote Customer/Partner Loyalty

Increase retention and revenue by nurturing your existing relationships. Target accounts that are under-utilizing your solution and spur them to action.

Cross-Sell

Capture a customer's attention and make a compelling pitch about other solutions you have to offer.

And many more!

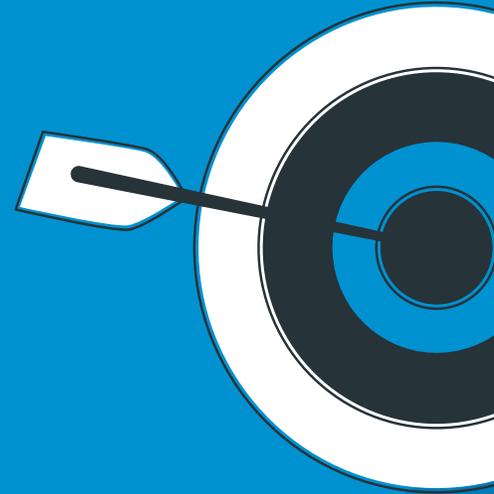
Conclusion

Human connection, personal attention, and an amazing customer experience will make your outbound ABM efforts more effective. Wildly effective, in fact. At PFL, we've seen 120x ROI from customers who use these tactics. We've seen engagement rates triple, sales cycles shrink, and pipeline activity grow by millions of dollars. Most importantly, customers praise the personal touch.

When you understand the web of influence in your accounts — the informal structures that drive decision making — and you capture that in your marketing data, you hold the key to building powerful human connections.

Whatever your use case and no matter the scale, PFL makes it easy use your data to launch multichannel customer journeys. We are the experts in tactile marketing automation and will help you strategize and deliver remarkable brand experiences.

To learn more about any of the plays in this book and discuss your marketing goals, contact us at inquire@pfl.com or 800-930-5088.



About PFL

PFL is a marketing technology company providing software solutions that help brands use digital intent signals to inform the content and timing of their tactile marketing to improve the ROI of their entire marketing spend. PFL connects sophisticated marketing professionals to the automation solutions that deliver remarkable brand experiences.

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