

A man and a woman are looking at a laptop screen in an office setting. The woman, wearing a blue shirt, is pointing at the screen. The man is looking at the screen with a focused expression. The background is slightly blurred, showing office furniture and equipment.

Getting Started with  
ACCOUNT-BASED  
MARKETING  
at Scale

D&B Lattice



## Summary

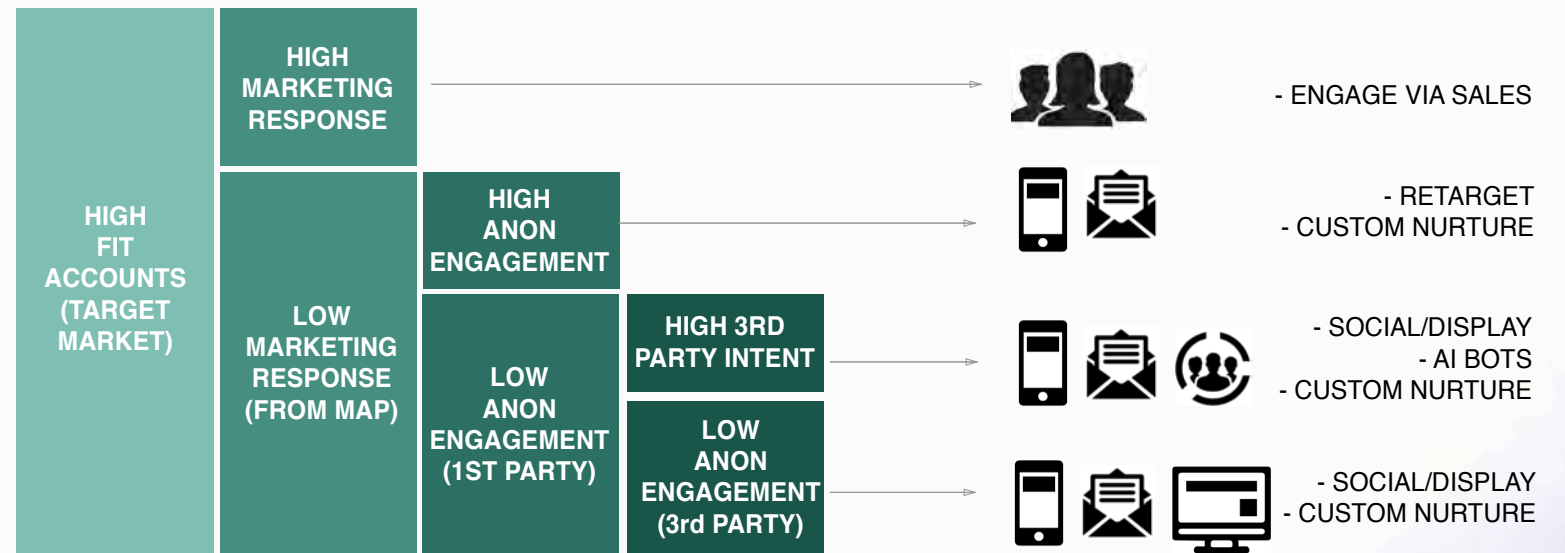
ABM has rapidly gone mainstream in the last year. According to ITSMA research, marketers are now allocating 28% of their budget to ABM, up from 20% last year. Yet only 1 out of 5 marketers are realizing the benefits of ABM ([Forrester Research study on ABM](#)).

Scaling ABM is a challenging process. ABM at Scale requires personalized 1:1 multi-channel engagement against your highest value target.

This guide will show you the 3 key steps to successfully scale your ABM program and see transformative results.

# ABM at Scale is a Strategy

Marketers must engage their target accounts differently based on their response, engagement and intent.



# Steps to Succeed

1

## Align

sales and marketing teams by deciding on target account universe



2

## Attract

target universe through multi-channel, personalized outreach



3

## Convert

through continuous, targeted outreach including social and display



Steps to Succeed #1

## Align

### Objective

Increase awareness for those accounts who are a good fit, but are not aware of your product.

### Identify Target Market

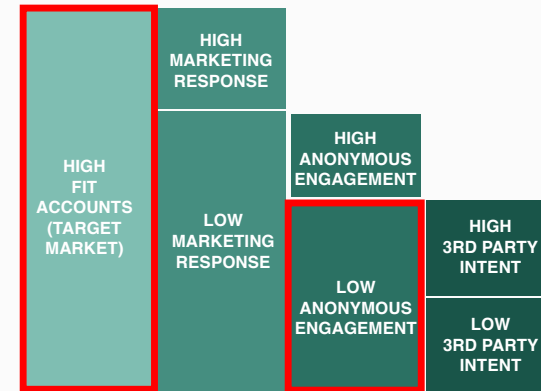
- High Fit in Target Market
- Low Anonymous Engagement

### How To

1. Define Criteria for Target Market
2. Build List for the Database
3. Score and Prioritize

### Success Criteria

- Create target account list with contacts
- Customize nurture streams for accounts
- Unify all data sources into one platform



Steps to Succeed #1

# Align

## Define Criteria for Target Market

Define desired attributes of target accounts based on existing customer criteria that sales and marketing should proactively pursue.

Select Attributes | Query Builder

Export | Save Segment

{ 1 AND 2 AND 3 AND ( 6 AND 7 ) AND ( 4 AND 5 ) }

Build a segment with accounts that have ALL of these conditions (AND) ⚙

Condition ID	Criteria	RECORDS	Action
1	My Attributes Analytics Solution: Fit Score is greater than or equal to 98	4,985	✕
2	Firmographics Revenue Range is >10B, 1-5B, 5B-10B	10,388	✕
3	Firmographics Country is USA	17,964	✕
ALL of these conditions (AND) ⚙			
6	My Attributes Analytics: Marketing Campaign Response Count: last month is greater than or equal to 30	2,078	✕
7	My Attributes Account Engagement Rating is Sizzling, Hot	5,022	✕

# Build List for the Database

Gather CRM, MAP and other data sources into a single platform and generate a complete list of all accounts that meet your target market criteria.

Steps to Succeed #1

# Align

The screenshot shows a 'Query Builder' interface with a search bar and 'Export', 'Clear', and 'Create Report' buttons. It displays six filter panels, each with a table of attributes, values, and record counts.

Filter Name	Attribute	Value	Records
Lattice Ratings (5)	Fit Model Rating	A	159
	Propensity Ratings Rating	A	159
	Account Fit Model Rating	A	19
	ai_rating__ai_score__Accou...	*	3,176
	ai_score__AccountId	*	3,176
Firmographics (90)	Industry	Government	2,939
	Revenue Range	>10B	4,865
	Employee Range	>10000	9,425
	Company Locations	>= 750	6,920
	Country	USA	15,076
My Attributes (45)	MKSuite: Marketing Campaign ...	< 2	28,412
	Media Optimize: Marketing Ca ...	< 3	27,729
	MKSuite: Marketing Campaign ...	< 3	26,074
	Targeting: Marketing Campaig...	< 3	25,974
	Campaign: Marketing Campaig...	< 3	25,409
Contact Attributes (9)	Lead_Engagement_Score	< 5	11,595
Intent (131)	Executive Compensation	High	10,344
Technology Profile (200)	Communications Tech, Tier 1	< 8	9,783

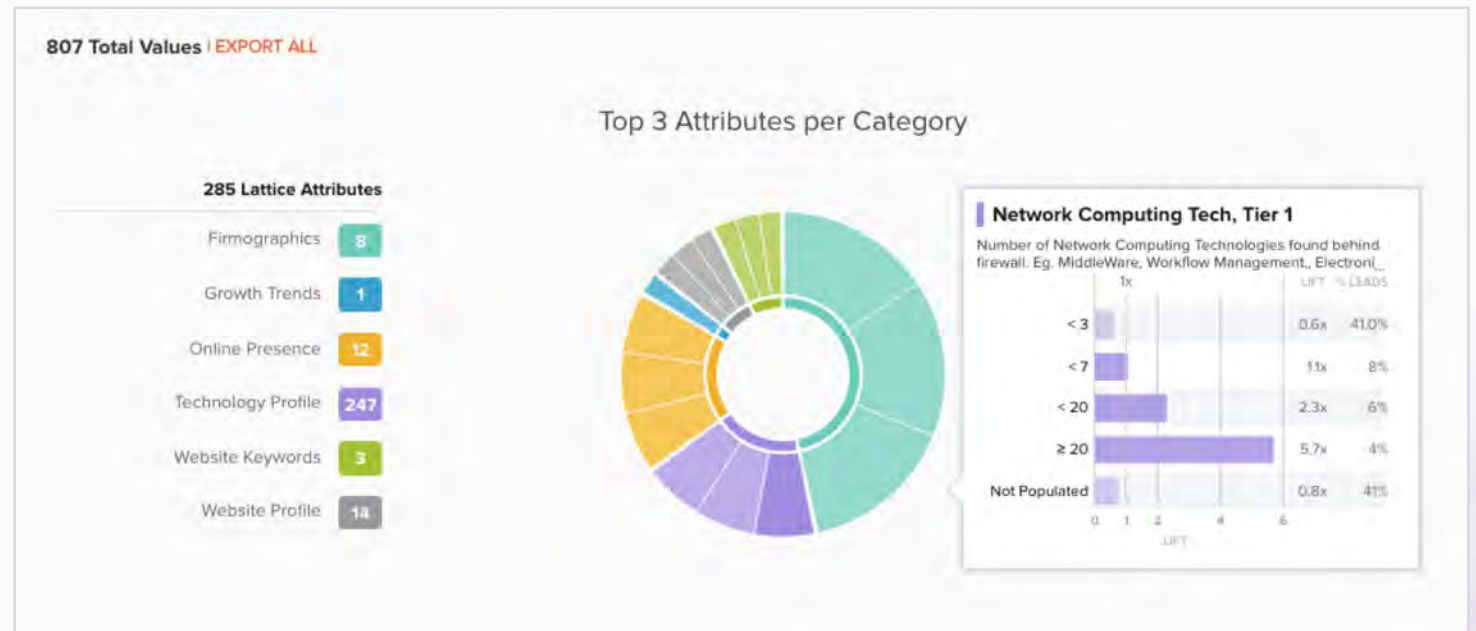


## Score and Prioritize

Score and prioritize your target accounts after aligning with sales on which accounts are highest priority. Based on the pre-designated criteria, your AI platform will score target accounts.

Steps to Succeed #1

# Align



Steps to Succeed #2

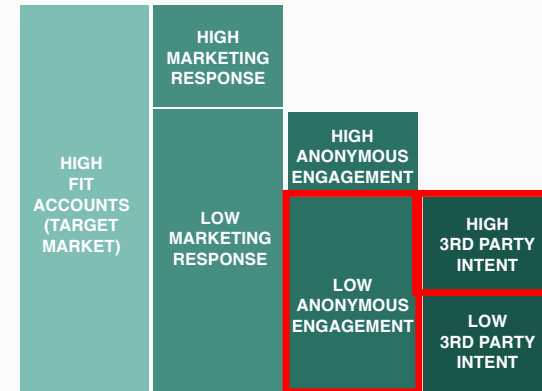
## Attract

## Objective

Generate awareness with all buyer personas at your target accounts.

## Identify Target Market

- High 3<sup>rd</sup> Party Intent
- Low Anonymous Engagement



## How To

1. Personalize Email, Social, Display
2. Contextualize for Sales
3. Orchestrate Multi-Channel Outreach

## Success Criteria

- Increase downloads from target accounts
- Generate names (opt-ins) from target accounts
- Increase web visits from target accounts

## Personalize Email, Social, Display

Take existing content and add personalized elements with data enrichment from your AI platform. Social and display ads are particularly effective in surrounding target accounts with your messaging.

Steps to Succeed #2

# Attract



**Reliable Mobile  
Solutions.  
Trusted Partners.  
One Provider.**



Steps to Succeed #2

## Attract

# Contextualize for Sales

Provide sales with insights and talking points about who they will call and why, creating more meaningful conversations during target account outreach.

**Account Detail** [Edit] [Delete] [Include Offline]

Account Owner	Nipul Chokshi [Change]	Rating	Hot
Account Name	United Oil & Gas Corp. [View Hierarchy]	Phone	(212) 842-5500
Parent Account		Fax	(212) 842-5501
Account Number	CD355118	Website	<a href="http://www.uos.com">http://www.uos.com</a>
Account Site		Ticker Symbol	UOS

Sell to Aerofilters Inc.

DAYS ACTIVE: 241 | STATUS: Open | **A**

Talking Points | Spend Analytics | Company Profile | Account Leads | Aggregated Web Activity | Company Fit | Detailed Web Activity

**Fit Rating: A**  
Company has high likelihood to purchase Enterprise Mobility solution based on AI model.  
Source: Lattice Atlas

**3rd Party Intent Strength: HIGH**  
Multiple users from this company researched topics related to **Mobility**. May be indicative of late stage buying behavior.  
Source: Lattice Atlas

**Complementary technologies detected: YES**  
Company is currently using **Microsoft Office 365**  
Source: Lattice Atlas








**Has purchased Verizon products: YES**  
Company has purchased **Verizon Cloud Storage Service** from us in the past  
Source: Customer Data

Steps to Succeed #2

## Attract

### Orchestrate Multi-Channel Outreach

Typically, you will run a program with multiple outbound tactics simultaneously. *Pro Tip:* Direct mailers can be very effective to include in the mix as well.

	Week 1	Week 2	Week 3	Week 4
Email				
Social	 	 	 	 
Sales				

Example of sample outreach

Steps to Succeed #3

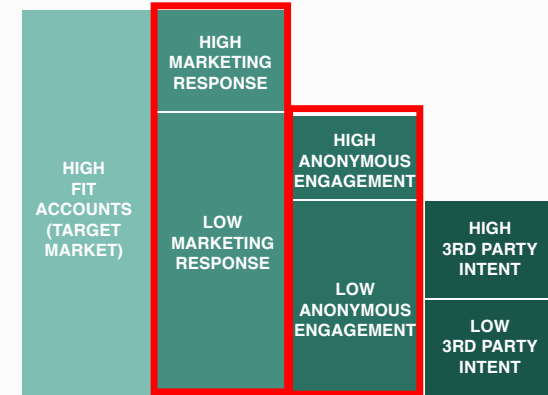
## Convert

### Objective

Increase engagement with all personas at target accounts and trigger outreach based on increase in account engagement.

### Identify Target Market

- High & Low Anonymous Engagement
- High & Low Marketing Response



### How To

1. Customize Nurture Streams
2. Personalize Web Retargeting
3. Create Account-Based Triggers

### Success Criteria

- Generate qualified opportunities in target accounts
- Increase conversion to pipeline/revenue
- Book 1st meetings in target accounts

## Customize Nurture Streams

Leverage automation triggers to automatically put target accounts into custom nurture streams.

Steps to Succeed #3

# Convert

The image displays two overlapping screenshots from a CRM system. The top screenshot, titled '4 - Add to Engagement Program', shows a configuration screen for 'VZW-Custom Engagement'. It features three choice options: 'Choice 1' (If: VZW - Legacy PBX is true, Stream: Legacy PBX), 'Choice 2' (If: VZW - Expanding Vehicle Fleet is true, Stream: Expanding Vehicle Fleet), and 'Default Choice' (Program: Standard Nurture, Stream: Stream 1). A blue arrow points from this screen to the bottom screenshot. The bottom screenshot shows the 'VZW-Custom Engagement' 'Streams' page. It has tabs for 'Streams', 'Setup', 'My Tokens', and 'Members'. Under the 'Streams' tab, there are two columns: 'Legacy PBX' and 'Expanding Vehicle Fleet'. Each column has a 'Set Stream Cadence' link and a 'Content' tab. The 'Content' tabs are active, showing lists of content items for each stream, such as 'VZW-Legacy PBX - Value Prop' and 'VZW-Legacy PBX - Webinar Intro'.

Steps to Succeed #3

**Convert**

## Personalize Web Retargeting

Re-engage with your high-fit anonymous website visitors on 3<sup>rd</sup> party properties with personalized, targeted ads to bring them back to your site.

To:

Global Networks Business | Internet and Phone -  
globalnetworks.com

**Ad** [www.globalnetworks.com/business](http://www.globalnetworks.com/business)

Unite your team and accelerate growth with Global Networks. Find your plan today.



From:

Unleash Employee Productivity | Global Networks + Microsoft -  
globalnetworks.com

**Ad** [www.globalnetworks.com/mobility/microsoft](http://www.globalnetworks.com/mobility/microsoft)

Empower and invigorate collaboration and innovation across the enterprise.



Steps to Succeed #3

# Convert

## Create Account-Based Triggers

Trigger sales outreach based on increase in account engagement.



**High Target Account Engagement**  
Strong prospect opportunity

DAYS ACTIVE: 36 | STATUS: Open | **A**

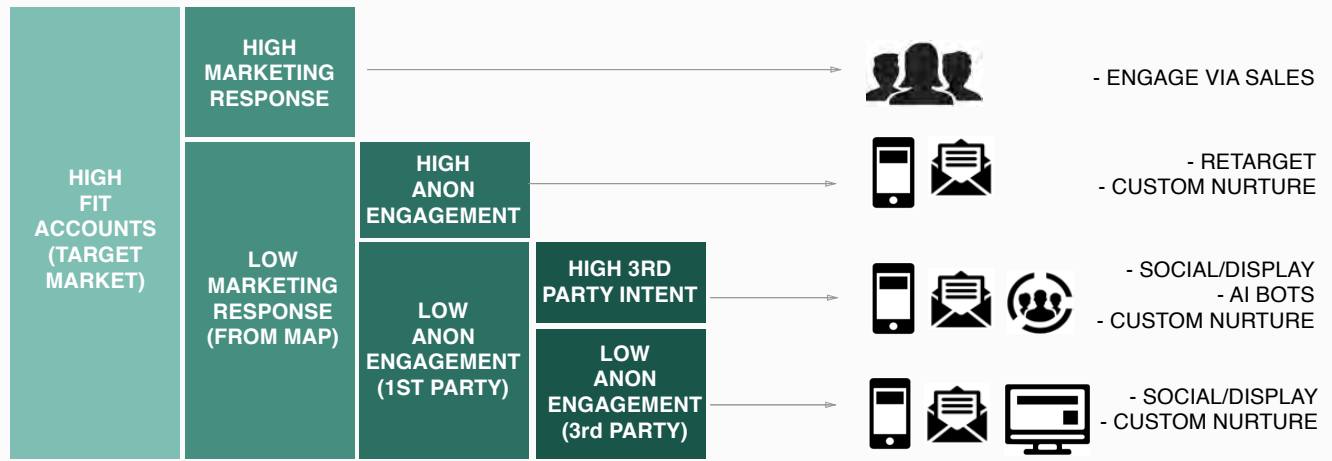
The target has been selected for conversion to **Globe Networks** for the following reasons:

**High target account engagement**  
Kenna Company has had 2+ contacts at the Director level or above attended a webinar, downloaded a whitepaper and visited the pricing section of the website.  
Source: **Globe Networks Marketing Automation Data**

**Firmographics Match**  
Kenna Company is an enterprise company with Global Revenue Range between \$500M – \$1B (our sweet spot)  
Source: **Lattice Data**

# Results

Results with this strategy were impressive



Sample customer results



**+2.3x** increase in post-click conversions

**-2.6x** decrease in cost-per-qualified lead



**30%** greater opportunity MRR

**2x** opportunity creation in target accounts



**73%** increase in leads/contacts to SQO

**27%** increase in overall funnel velocity



## Request a Free Trial of D&B Lattice Predictive Lead Scoring

This eBook was originally written by Lattice Engines which was acquired by Dun & Bradstreet in 2019. Learn more about D&B Lattice, our market-leading Customer Data Platform, by visiting [dnb.com](https://dnb.com).

### About Dun & Bradstreet

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