The Crawl, Walk, Run of Multi-Channel ABM

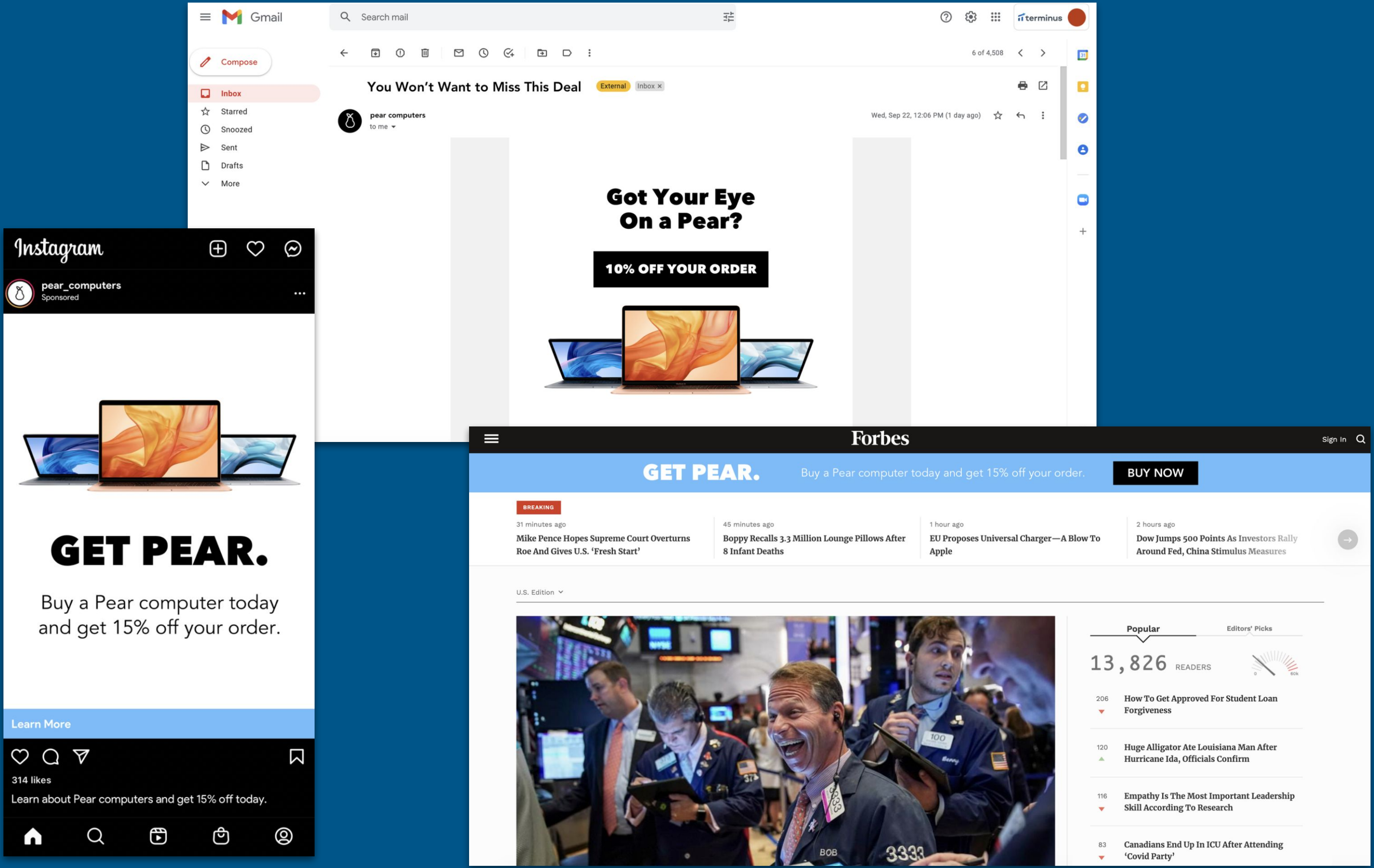
Tuesday, June 14

terminus

Today's Agenda

1. Multi-Channel: What and Why?
2. Common ABM Roadblocks
3. What is a Crawl, Walk, Run Approach?
4. Example "Crawl" Program
5. Q&A!

What is Multi-Channel ABM?


Gmail
Search mail
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6 of 4,508
You Won't Want to Miss This Deal
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Dow Jumps 500 Points As Investors Rally Around Fed, China Stimulus Measures
U.S. Edition
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Editors' Picks
13,826 READERS
206
How To Get Approved For Student Loan Forgiveness
120
Huge Alligator Ate Louisiana Man After Hurricane Ida, Officials Confirm
116
Empathy Is The Most Important Leadership Skill According To Research
83
Canadians End Up In ICU After Attending 'Covid Party'

Why Multi-Channel?

Why Multi-Channel?

Because it works...

<table>
<tr><td colspan="2">

What the Market is Saying…

</td><td colspan="2">

What Customers are Saying…

</td></tr>
<tr><td>3–4</td><td>Number of devices your buyers use, on average</td><td>686%</td><td>Increase in account engagement with Ads + Chat</td></tr>
<tr><td>72%</td><td>of prospects want to engage with you on multiple channels</td><td>77%</td><td>Decrease in bounce rate with Ads + Web Personalization</td></tr>
<tr><td>37%</td><td>Increase in response rate on multi-channel campaigns compared to single channel</td><td>6X</td><td>Increase in ad click-through rate with Ads + Email</td></tr>
</table>

Roadblocks to Implementing Multi-Channel

Limited **bandwidth** or resources

Multiple channel **owners**

Keeping messaging **consistent**

Orchestration complexity

Data availability & accuracy

Marketing & Channel **Attribution**

A Crawl, Walk, Run Approach to ABM

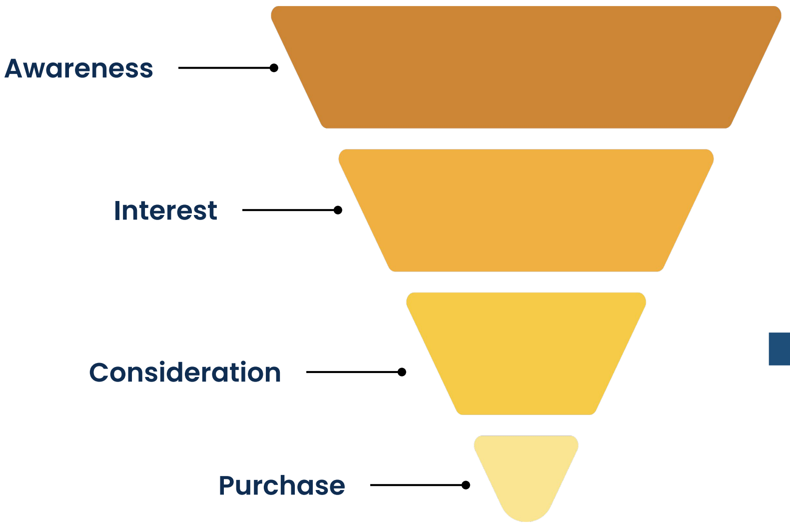
What is a ‘Crawl, Walk, Run’ Approach?

A scaled approach to go-to-market program planning and execution that involves continuous testing, measurement, and optimization.

Poll!

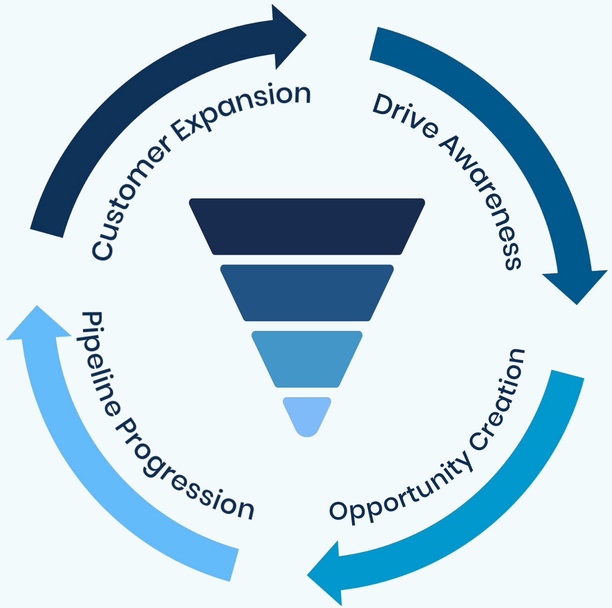
Where are you on the crawl, walk, run spectrum?

Inbound Marketing



Lead-Based Metrics

Full Lifecycle Engagement



Account-Based Metrics

The TEAM Framework

AN OPERATING MODEL TO GUIDE YOUR ACCOUNT-BASED INITIATIVES

TEAM

Target

Leveraging your data to align on key segments and prioritize account engagement investments

Engage

Aligning customer experiences across channels to ensure maximum efficiency and relevant, value-driven messages

Activate

Identifying and streamlining how your sales organization will consume and apply account signals and engagement data

Measure

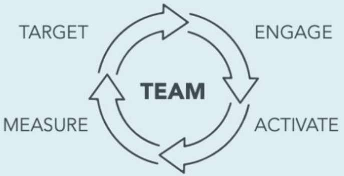
Ensuring you have full visibility to channel performance and account-based outcomes to communicate results and optimize your programs

Planning Your Multi-Channel Approach

- How well are we able to target (what data do we use) at each funnel stage?
- What channels are we using today at each funnel stage?
- How well do we work with our Sales & Customer Success teams at each funnel stage?
- What metrics should we / are we able to track at each funnel stage?

Example Crawl Program

The Terminus TEAM Framework



Primary Program Manager
Nancy Jones,
Director Demand Gen

Overall Program Budget
$50,000

Length of Program
One Quarter

Platforms Leveraged
Terminus, Sendoso, Salesloft, Salesforce, Marketo

What is the Overarching Goal of the Program?

ACQUISITION ACCELERATION EXPANSION

Program Name

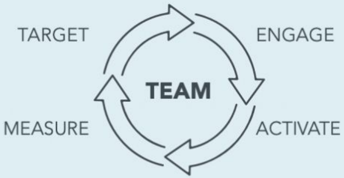
Boston Area Software Product Demand Generation

Describe the Program
Drive demand generation in the Northeast region for Software Product. Focus on enterprise accounts in the high tech and manufacturing industries to create awareness, and drive new business pipeline opportunities for the account executives. We will use a multi-threaded approach across cross functional team members.

Desired Outcome
Generate New Business Opportunities in the Northeast region

Key Internal Stakeholders
Director of Demand Generation, Head of Northeast Sales, C-Suite Executives

The Terminus TEAM Framework



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Program Overview

Program Name

Boston Area Software Product Demand Generation

Define the Control Group

We'll use the Northeast program to pilot a comprehensive account-based outreach, we'll compare success of the program against accounts of the same profile that are outside of the Northeast region and not receiving any account-based outreach.

Identify Accounts or Efforts that are not in Scope

All efforts for this program are specific to creating new opportunities within good fit prospect accounts in the Northeast for our Software Product. Other product line promotion or accounts in other regions are not in scope.

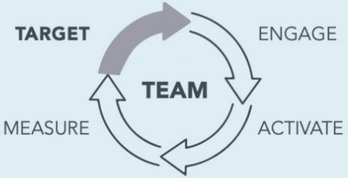
Other Notes

Based on our success in this program, we can leverage our learnings to scale and launch additional regional programs to promote our Software Product.

TARGET

Program Name: *Boston Area Software Product Demand Generation*

The Terminus TEAM Framework



Check the platform features that apply:

- [x] Terminus Account Hub
- [ ] Intent Data: Bombora
- [ ] Intent Data: G2
- [x] Relationship Data (by Location)

Which accounts will you Target?

Good Fit Accounts in the Greater Boston Area with Marketing Responses but no open opps.

Which team members are involved in determining accounts in the list?

Marketing Operations for insights into the appropriate data fields

Sales for alignment

What attributes will narrow the list of potential accounts to define the identified accounts for this program?

High Tech & Manufacturing Industry, Employee Size over 500, Revenue Range over $1M, Northeast Region, Fit Score of 80+

What data sources will you leverage?

Terminus firmographic Data,
Salesforce Account Data

How often will you update the accounts in the list?

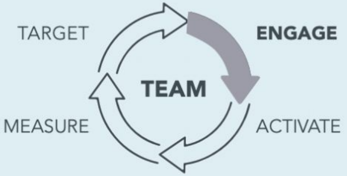
Quarterly

Who is responsible for managing updates to the list as needed?

Shirley, Marketing Operations Manager

Other Notes
None

The Terminus TEAM Framework



Check the platform features that apply:

- [x] Targeted Display Ads
- [ ] Retargeting
- [x] LinkedIn
- [x] Email Experiences
- [ ] Chat Experiences
- [ ] Web Experiences

ENGAGE

Program Name: *Boston Area Software Product Demand Generation*

What strategies will you leverage to Engage the identified accounts?

Account-Based Advertising, Direct Mail, ADR Outbound, Industry Happy Hour Meet-ups

What is the messaging for the outreach?
Top minds in Boston use our software

Which assets will be leveraged?
Landing Page for event registration
CEO invite to C-Suite (DM)
Gartner Report on software
Local Boston Company Case Study

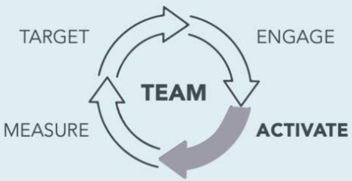
Which team members are involved?
Shirley, Marketing Operations Manager
Donna, Digital Marketer
George, ADR Manager
Freddie, Northeast Field Marketing Manager

What platforms will be leveraged?
Terminus, Sendoso, Marketo, Salesloft

Who is responsible for orchestration?
Freddie, Field Marketing will run Event Management, Donna, Digital Marketing will execute Ad Campaigns (email and web) George ADR Manager, will coordinate ADR Outreach

Other Notes
Use Terminus Campaign Analytics to identify successful content/messaging and event types for the Northeast region based on regional closed won opportunities.

The Terminus TEAM Framework



Check the platform features that apply:

- [x] Terminus Anonymous Visitor ID
- [x] Terminus Engagement Spike Model
- [x] Terminus Sales Insights
- [x] Chat from Anywhere
- [x] Email Banner Clicks

ACTIVATE

Program Name: *Boston Area Software Product Demand Generation*

Define the process for disseminating Terminus platform data to Activate members of your Sales teams.

Create Salesforce Engagement Spike report for Northeast ADRs to prioritize outreach leading up to events. Create an Account List filtered by Account Owner to allow ADRs to see what marketing messaging accounts are engaging with. Train the ADR team about the reports and resources available. Use Relationship Data (email and calendar patterns) to see which accounts from Boston all of your team members have the best relationships with.

Which key data points will sales teams retrieve or receive?

Ad Impressions/Clicks from Account List, Page Views from Account List, Engagement Spike notifications, Event Registrations, Other Campaign responses from Accounts on Account List. Relationship scores of all Boston accounts, email banner clicks, past chat conversations.

What is the cadence for attaining data?

Spike notifications are delivered automatically on a weekly basis. Other campaign information will be updated in real time.

What is the desired sales action?

Reps should bookmark the account list in the hub to continuously keep track of new marketing activity and reach out with designated messaging. Use the weekly spike report to prioritize outreach based on engaged accounts.

Who is responsible for ensuring sales is receiving the information necessary?

Shirley, Marketing Operations Manager

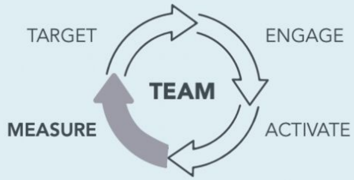
Who is responsible for attaining buy-in from sales leadership?

George, ADR Manager & Caroline, CMO

Which team members are involved?

ADR Team, Marketing Ops, Demand Gen for program oversight

The Terminus TEAM Framework



Check the platform features that apply:

- [x] ABM Dashboard
- [ ] Multi-Touch Attribution
- [ ] Opportunity Insights
- [x] Campaign Analytics
- [ ] Customized Reports

MEASURE

Program Name: *Boston Area Software Product Demand Generation*

What tools will be used to Measure success of the overall program?

Terminus Scorecard, Terminus Campaign Analytics, Salesloft reports, Google Analytics, Relationship Scores

Which KPIs will be used to determine success of the overall program?

# of Opportunities/$ Pipeline created
# of Event attendees
# of Campaign Responses within Account List
# of Deals/$ Revenue closed

How often will these be measured?

# of Campaign Responses - Weekly
 # Opps/Pipeline - Weekly
# of Event attendees - After each event
# of Deals/$ Revenue - Quarterly

Which team members are involved in measurement?

Marketing Operations to manage the reporting, full team responsible for reviewing data and iterating

When will results be reported to the greater team?

Monthly

Other Notes

Leverage the reporting regularly, not just monthly to track leading indicators. Use the directional data to tweak engagement programs for optimal performance.

Final Takeaways

If you're only going to do 4 things after today, do these...

Self-Assess Your Readiness Throughout the Entire Funnel

Use the TEAM Framework to create baselines across your entire funnel. Where are you strong? Where are your gaps?

Start Small but Know Where You Want to Iterate

Align your first programs to your primary business objectives and know what you want to measure success against.

Think About Your Objectives First, Channels Second

What are you looking to drive for your business? Your program and channel strategy should support those goals.

Use Our Campaign Planner or Develop Your Own

Approaching programs in a repeatable format is the best way to keep things manageable.

Q&A

Thanks for joining us!

Connect with me on LinkedIn!

Shea Castle

Questions?

Email: shea@terminus.com

For more information, please visit **Terminus.com** terminus

