ABM Campaign Workbook

A Step-by-Step Template for Planning ABM Campaigns with the TEAM Framework

terminus

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YOUR COMPANY NAME

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Workbook Contents

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Account-Based Marketing Is Now a Revenue Strategy for Your Entire Team

ABM is transforming marketing, sales, and CS teams into full-funnel revenue generators.

B2B demand marketers have a tough hill to climb, in the market and in their own organizations. Most industries are becoming hyper-competitive and commoditized, which means that leads are getting more expensive and harder to find. At the same time it's getting easier for customers to find and switch to competitors, which means customer marketing is becoming a more critical part of the overall marketing mix.

Within many companies, volume-based lead generation has driven crippling misalignment between marketing and sales, resulting in missed revenue targets and organizational angst.

In just a few years, B2B marketers' interest in and use of ABM has evolved from a trend-setting idea to a mainstream strategy. While the strategy is as old as B2B itself, the new technology emerging to support the growing demands of today's B2B landscape is becoming more standardized as practitioners solidify their ABM strategies and KPIs become more normalized.

Marketers who have successfully made the switch to ABM report more frequently meeting or exceeding revenue targets, improving metrics such as ACV and deal velocity, and engaging more of their target accounts more frequently. And the kicker? ABM keeps marketing and sales in lockstep alignment, so all that time and focus spent bickering over whether a lead was qualified can go toward collaborating on killer campaigns that move revenue forward.

45% INCREASE IN CLICK-THROUGH RATES FROM ADVERTISING

70% INCREASE IN OPPORTUNITIES CREATED

25% HIGHER WIN RATE

28% INCREASE IN DEAL VELOCITY

Citation: Gartner, 2019, Tech Go-to-Market: Plan, Build and Manage a Successful Account-Based Marketing Program, https://www.gartner.com/document/3688825?ref=sendres_email

SECTION ONE

Introduction to the TEAM Framework

First, let's begin by introducing a framework for success with account-based marketing.

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TEAM: The Framework for ABM Success

Simple, Yet Powerful Framework For Executing Your Account-Based Strategy

TARGET

Target the right accounts with firmographic, intent, engagement, and relationship data.

ENGAGE

Delivering personalized messages to the right audiences no matter where they are. Orchestrate consistent experiences with your brand across display advertising, employee email, web personalization, chat, and much more.

ACTIVATE

Keep your customer-facing teams aligned from the first touch all the way through renewal and expansion by seamlessly pulling together account data that matters most.

MEASURE

See all of your team's activities are moving the needle. Use attribution and influence reporting to measure and optimize your message, audiences, or spend.

Why start with TEAM?

ABM can be daunting, but it doesn't have to be.

Account-based marketing rethinks B2B marketing from the ground up. It impacts how you run market segmentation and planning, how you work with sales, how you think about channel orchestration and optimization, and even how your executives and board report on and view marketing progress.

That's a lot for a marketer to take on.

That's where the TEAM Framework comes in. It's a simple way for you to think through how to plan, operate, and evaluate your B2B marketing campaigns, and communicate their success clearly both within your team, and across your organization.

About Terminus

"Terminus was founded in 2014 out of a need to give B2B marketing and sales teams a better way to go to market. The premise was simple: since only 1% of inbound leads became customers, we set out to build a solution to help marketers find their next best customer and give them everything they needed to create a conversation with them. Now, over 1,000 customers have made Terminus the #1 account-based marketing platform on the planet. Terminus provides all of the channels, data, and tools revenue teams need to create amazing experiences for their most important audiences. Recently, Terminus was named a Leader in the 2020 New Wave™ of ABM Platforms and topped the G2 ABM leaderboard for the 10th consecutive quarter, powered by real customer reviews."

Use ABM for Efficient Growth Across All Stages of Your Revenue Funnel

A Layout of All Relevant Strategies, Targeting Options, Plays, and KPIs.

Stage	ACQUISITION		ACCELERATION		EXPANSION		
Strategy	Create TOF Engagement	Create New Opps	Accelerate Deals in Pipe	Revive Stalled Opportunities	Retain More Customers	Land & Expand	Cross-Sell New Products
Audience Targeting	› High fit net new accounts › In-market intent signals	› Light engagement › High fit	› Open opportunities	› Overdue opportunities › Lost deals	› Upcoming renewals › Competitor intent › Relationship Scores	› Intent in new offices › Likely to use more › Relationship Scores	› Intent for adjacent solutions › New departments › Relationship Scores
Engagement & Activation Plays	AB Display, Retargeting, + LinkedIn, Chat, Web Personalization	1-to-1 Advertising, Targeted Email Banners	Retargeting, Personalized Email, Direct mail, Events, Targeted Email Banners	Retargeting, High-touch tactics, Precision 1-to-1	Ads + Email Feature Comms, Exec awareness advertising, Web Personalization	IP and persona - based 1-to-1 advertising	AB success outreach, Web Personalization, Email Banners
KPIs (success metrics)	Engaged Accounts (#) Account Engagement Rate (%)	Opportunity Accounts (#) Opportunity Rate (%)	Closed-Won Accounts (# & $) Account Win Rate (%) Velocity, ACV	Closed-Won Revivals (#) Account Win Rate (%)	Gross Retention (%)	Net Retention (%)	Expansion Win Rate (%)

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TEAM Framework + The Terminus ABM Platform

TARGET

Combine & connect all your data in one place to easily create and manage segmented lists of accounts.

- Terminus Account Database
- G2 Crowd & Bombora Intent Data
- Relationship Data
- Terminus Firmographic Data Append

ENGAGE

Earlier, deeper penetration into buying centers with best-in-class advertising and program management.

- Terminus Account-based Advertising
- LinkedIn Sponsored Content via Terminus
- Terminus Account-based Retargeting
- Account-Based Chat
- Web Personalization
- Email Banners

MEASURE

Comprehensive account-based and multi-channel reporting so you know how your programs drive revenue.

- ABM Dashboard
- Multi-Touch Attribution
- Opportunity Insights Campaign Analytics
- Customized Reports
- Email Banner Clicks
- Chat from Anywhere

ACTIVATE

Enable sales teams with real time prompts when accounts are most engaged.

- Email Banner Clicks
- Chat from Anywhere
- Terminus Anonymous Visitor ID
- Terminus Engagement Spike Models
- Terminus Sales Insights

SECTION TWO

The Interactive Workbook

Use the following workbook to outline, plan and execute TEAM-based ABM programs.

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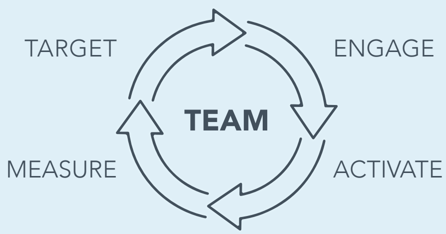
The Terminus TEAM Framework



Lifestyle stage you'll focus on:

- ☐ Acquisition
- ☐ Acceleration
- ☐ Expansion
- ☐ Other

Primary Program Manager

____

Overall Program Budget

____

Length of Program

____

Platforms Leveraged

____

Define Your Program

Decide which lifecycle stage you'll focus on:

☐ **ACQUISITION**
e.g. New market entry Key account acquisition

☐ **ACCELERATION**
e.g. Speed enterprise deals

☐ **EXPANSION**
e.g. Increase renewal TCV

☐ **OTHER**

Program Name: ______________________________

Program Description

Create a clear high-level overview of what this program is.

____

____

Desired Outcome

How will you define success of the program? Typical ABM KPIs are accounts engaged, opportunities opened, pipeline influenced, deal cycle acceleration, ACV, and — of course — revenue won.

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____

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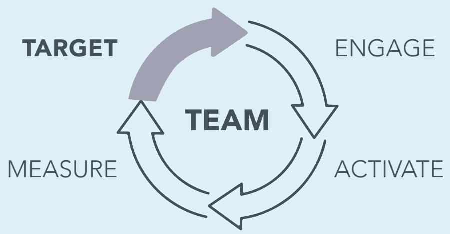
Key Internal Stakeholders

Clarify roles and responsibilities across marketing, sales, and related functions such as product or operations.

____

____

The Terminus TEAM Framework



Check the platform features that apply:

- [ ] Terminus Account Hub
- [ ] Intent Data: Bombora
- [ ] Intent Data: G2
- [ ] Terminus Relationship Data

TARGET

Program Name: ______________________________

Define your Ideal Customer Profile (ICP):

This is the firmographic, environmental, and behavioral attributes of accounts you expect to be your best customers. Start by looking at your highest-value, most retained current customers to identify trends.

____

____

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Build out your ICP in your CRM:

Identify any gaps in your CRM and add missing accounts that match your ICP. Source accounts from data providers or custom industry lists. For customer campaigns, this may involve ensuring you have the right customer data in your CRM.

Define criteria for your Target Account List (TAL) for this program:

Define specific attributes that make an account ideal for this program. For example, you may select accounts in your ICP that have shown intent in the last 60 days for an acquisition campaign.

List data sources for your TAL:

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____

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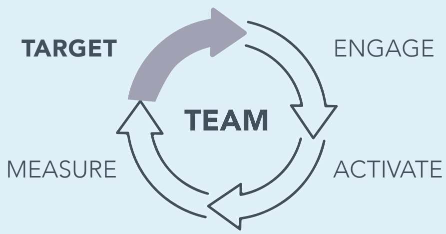
The Terminus TEAM Framework



Check the platform features that apply:

- [ ] Terminus Account Hub
- [ ] Intent Data: Bombora
- [ ] Intent Data: G2
- [ ] Terminus Relationship Data

TARGET

Define roles and responsibilities

List Owner: ______________________________

Account List Creation Team: ______________________________

____

Sales Champion: ______________________________

How frequently will you update the list? ______________________________

How often will you update the accounts in the list? ______________________________

What behavioral signals (specific engagement metrics, relationship score increasing or decaying, etc.) will you use as triggers for different tactics:

____

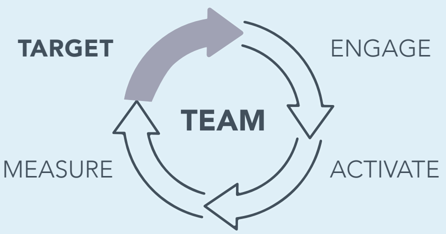
____

____

Other Notes:

____

The Terminus TEAM Framework



Check the platform features that apply:

- [ ] Terminus Account Hub
- [ ] Intent Data: Bombora
- [ ] Intent Data: G2
- [ ] Terminus Relationship Data

TARGET

Define the Control Group:

This is a list of accounts similar to those in your TAL, to which you will not apply ABM. You'll use this group as a control to determine the impact of your ABM programs. Keep in mind your lists will need to be large enough to have statistically significant results.

____

____

In Terminus, create an Account List from this control group. You will use this for reporting throughout your program.

Establish KPI baselines for this target group.

Which demand challenges are you not trying to solve with this program?

____

____

KPI 1: ______________________ **Current Value:** ______________________

KPI 2: ______________________ **Current Value:** ______________________

KPI 3: ______________________ **Current Value:** ______________________

Other Notes:

____

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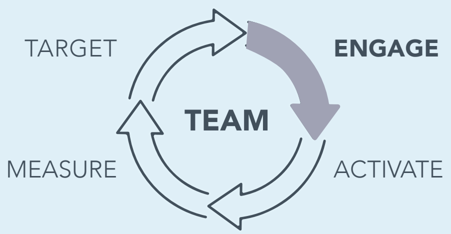
The Terminus TEAM Framework



Check the platform features that apply:

- ☐ Targeted Display Ads
- ☐ Retargeting
- ☐ LinkedIn
- ☐ Email Experiences
- ☐ Chat Experiences
- ☐ Web Experiences

ROLES & RESPONSIBILITIES

Primary Program Manager

____

Operational/Orchestration Owner

____

Content Owner

____

ENGAGE

Program Name: ______________________________

List your engagement channels:
In ABM, the more channels you use, the higher ROI you typically see. Choose a minimum of three channels, such as display advertising, email, and direct mail.

____

What messaging will you use?
Outline key messaging & value props, and include any sequences you might use.

____

List necessary assets:
These may be existing assets or newly created content.

____

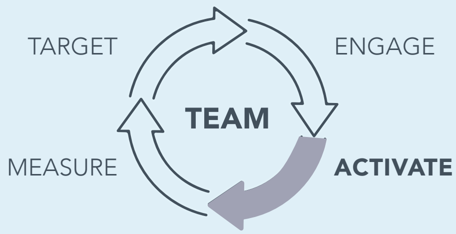
Describe the tech stack required:

____

Who is responsible for orchestration?
You may need to break out responsibilities across content creation, campaign orchestration, and reporting.

____

The Terminus TEAM Framework



Check the platform features that apply:

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

ACTIVATE

Program Name: ______________________________

Define the process for Activating your sales team:

Include what each data signal is that they can expect, on which cadence, and what their actions should be based on that signal.

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What outreach templates will be available to the sales team?

These may be email cadences, scripts, invitations to events or executive meetings, access to contact completion tools, etc.

____

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____

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

Marketing Owner:

____

Sales Owner:

____

Who is your sales champion?

This should be a member of your BDR and/or account executive team who is excited about this ABM program and will help show its value to the rest of the team:

____

Who else will be involved in sales activation?

____

____

____

____

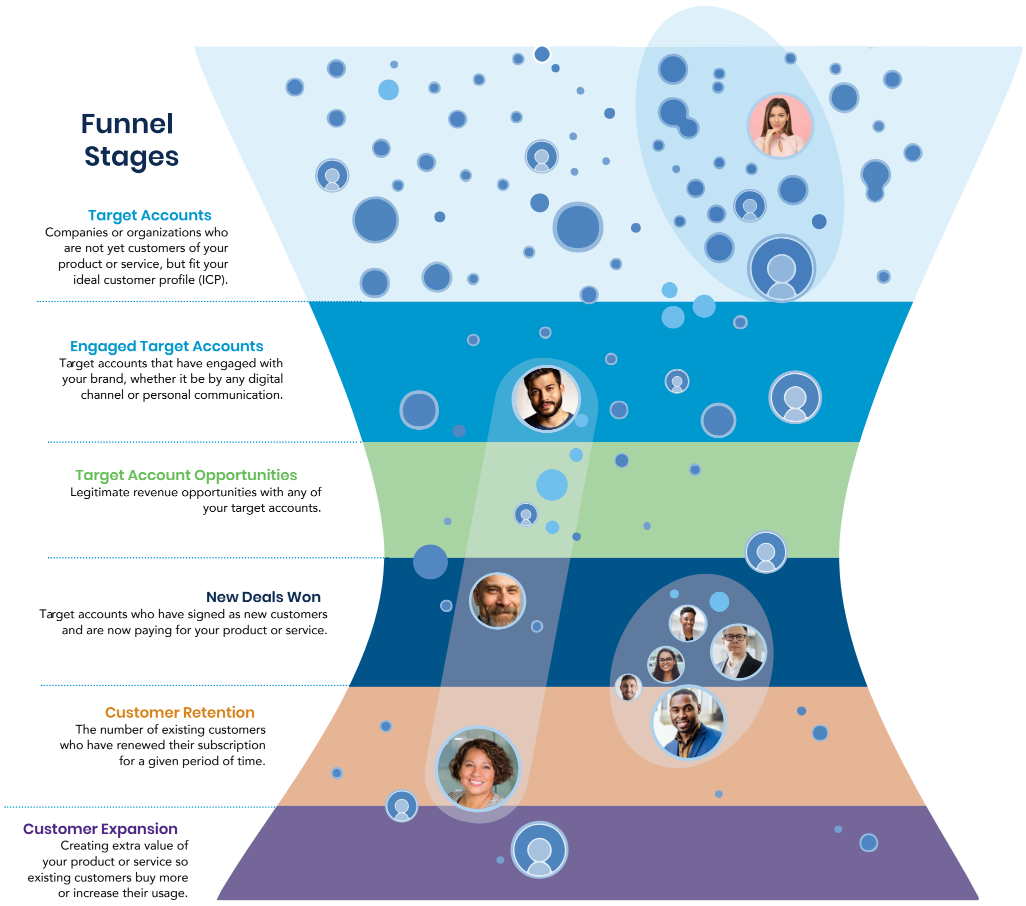
The Account-Based Marketing Full Revenue Funnel

A full-funnel approach to account-based marketing, which prioritizes your current customers while still growing the top of the funnel, is the future of marketing.

Properly showing the outcomes of your ABM programs starts with using modern measurement tools to measure what matters — revenue outcomes — rather than lead-based vanity metrics.

ABM programs can't be measured with the traditional lead funnel. Because account based marketing emphasizes quality over quantity and touches every stage of the account lifecycle, it requires a new funnel. Effectively showing the outcomes of your ABM program starts with using modern measurement tools to measure what matters most: revenue outcomes.

- Engaged Accounts as a subset of your target account list
- Opened Opportunities from accounts in your list
- Total Pipeline, measured as a dollar value
- Revenue Won and New Companies Acquired from your target account list.
- Average Contract Value, which is typically higher for account-based initiatives
- Average Deal Cycle, which is often up to 20% shorter for target account programs.



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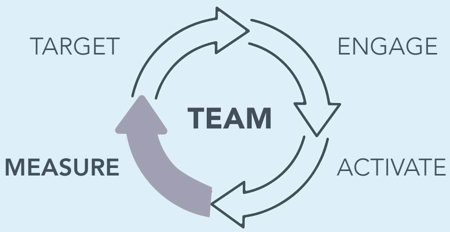
The Terminus TEAM Framework



Check the platform features that apply:

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

MEASURE

Program Name: ______________________________

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

____

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

____

How often will these be measured?

____

Which team members are involved in measurement?

____

When will results be reported to the greater team?

____

Other Notes:

____

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SECTION THREE

Use Cases & Campaign Examples

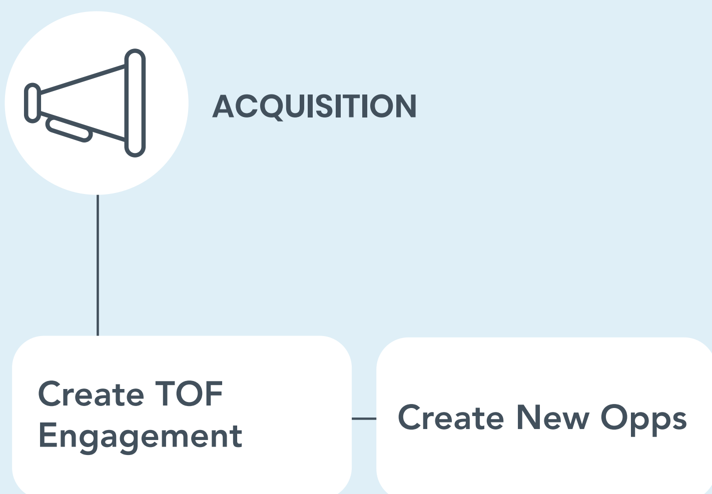
Inspiration to create your own TEAM framework

USE CASE

ACQUISITION

ACQUISITION:

Top of funnel Demand Generation, driving brand awareness and marketing engagement to create new opportunities from net new accounts.



COMMON GOALS:

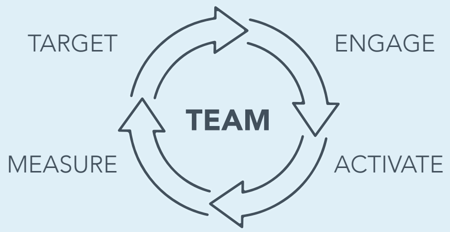
Pre-Targeting
Generating awareness with businesses that are not familiar with organization.

Engagement & Nurture
Create interest within buying centers that have not entered the sales process.

POTENTIAL TEAM MEMBERS INVOLVED IN ACQUISITION STRATEGIES:

- Demand Generation
- Digital Marketing
- Marketing Operations
- Sales Development
- Sales Ops

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

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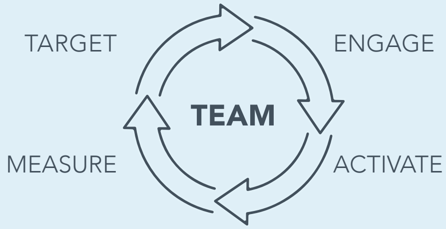
The Terminus TEAM Framework



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

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.

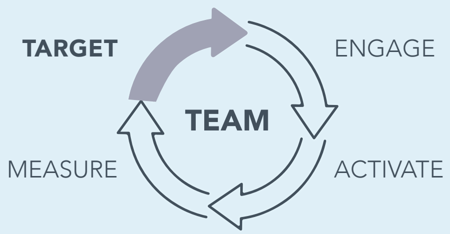
Identify Accounts or Efforts that are not in Scope

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.

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)

TARGET

Program Name: *Boston Area Software Product Demand Generation*

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

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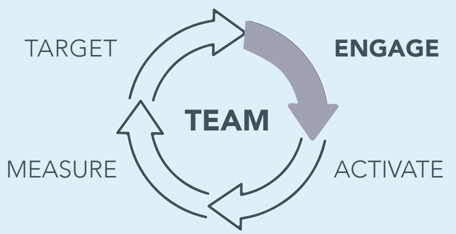
The Terminus TEAM Framework



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.

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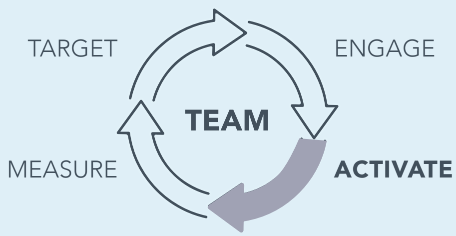
The Terminus TEAM Framework



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

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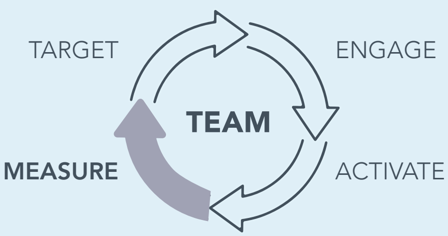
The Terminus TEAM Framework



Check the platform features that apply:

- [x] ABM Dashboard
- [x] 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.

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USE CASE

PIPELINE ACCELERATION

ACCELERATION:

Increasing engagement, speed and win rate of open opportunities as they move through the Sales Cycle.

COMMON GOALS:

Pipeline Acceleration
Coordination between marketing and sales to create and maintain momentum during the buying cycle.

Winbacks
Regenerating interest within an account where buying momentum has been lost.

POTENTIAL TEAM MEMBERS INVOLVED IN ACQUISITION STRATEGIES:

- Demand Generation
- Field Marketing
- Marketing Operations
- Account Executives
- Sales Ops

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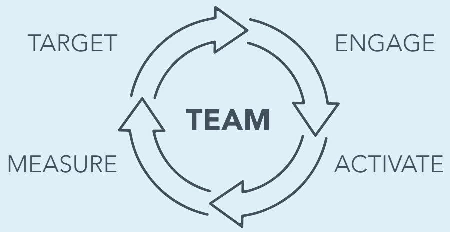
The Terminus TEAM Framework



Primary Program Manager
Austin, Field Marketing

Overall Program Budget
$65,000

Length of Program
Two Quarters

Platforms Leveraged
Terminus, Salesloft, Sendoso, Salesforce, Email

What is the Overarching Goal of the Program?

ACQUISITION ACCELERATION EXPANSION

Program Name

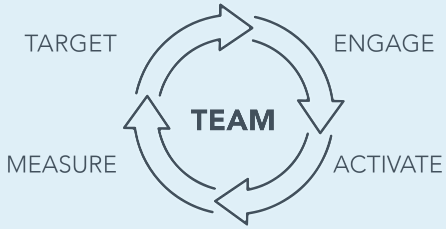
New Consumer Brands Product, Pipeline Acceleration

Describe the Program
Targeted program to drive new business opportunities, resulting in the adoption of our newly launched Consumer Brands Product. Sales and Marketing will work together to determine accounts with mid-stage open opportunities and execute a multi-channel strategy.

Desired Outcome
Increased account engagement with more team members and more marketing and sales efforts to Drive faster sales cycle with a lift in total number of closed won opportunities.

Key Internal Stakeholders
Field Marketing, Demand Generation, Sales Leadership, C-Suite

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

Program Overview

Program Name

New Consumer Brands Product, Pipeline Acceleration

Define the Control Group
The control group will be accounts in the commercial vertical that bought our commercial product when it was new last year as they were not part of a multi-threaded account-based acceleration plan.

Identify Accounts or Efforts that are not in Scope
Accounts in the Consumer Brands vertical that do not have an open opportunity in stage 2 or later are out of scope. Additionally, existing customer accounts that are in the consumer brands industry will not be included. Start reaching out first to those accounts with the highest relationship scores.

Other Notes
None

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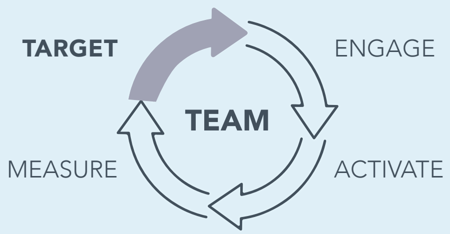
The Terminus TEAM Framework



Check the platform features that apply:

- [x] Terminus Account Hub
- [ ] Intent Data: Bombora
- [ ] Intent Data: G2
- [x] Terminus Relationship Data

TARGET

Program Name: *New Consumer Brands Product, Pipeline Acceleration*

Which accounts will you Target?

Prospect, Enterprise accounts in the Consumer Brands vertical with open opportunities

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

Gina, Director of Demand Generation, Austin, Field Marketing Lead, Lynn, Sales Ops

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

Enterprise accounts, that are prospects, consumer brands vertical with open opportunities in stage 2 or later or show a relationship score of 80 or above.

What data sources will you leverage?

Terminus Firmographic Data, SFDC Opportunity & Prospect Data, Relationship Data

How often will you update the accounts in the list?

The list will be updated monthly.

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

Gina and Lynn will work together to ensure the list stays up to date.

Other Notes

None

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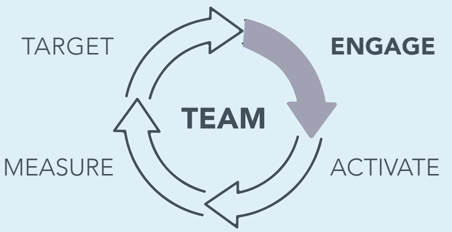
The Terminus TEAM Framework



Check the platform features that apply:

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

ENGAGE

Program Name: *New Consumer Brands Product, Pipeline Acceleration*

What strategies will you leverage to Engage the identified accounts?

Targeted display advertising, direct mail, personalized ADR outreach emails (with banners), prospect dinner with our Heads of Product & Sales

What is the messaging for the outreach?

How Consumer Brands companies gain efficiencies leveraging the New Product

Which assets will be leveraged?

New Consumer Brands Product Highlight in Analyst White Paper, Webinar with Customer Highlight, Heads of Product & Sales Dinner, Targeted chat conversations on new product page of website

Which team members are involved?

Gina, Director of DG, Austin, Field Marketing, Todd, Head of Sales, Lisa, ADR Manager

What platforms will be leveraged?

Terminus, Sendoso, Salesloft, Email

Who is responsible for orchestration?

Gina will run account-based ads and chat

Austin will manage Direct Mail and Invites for Prospect Dinner

Lisa will coordinate ADR Outreach

Todd will manage personal invites to the Prospect Dinner

Other Notes

None

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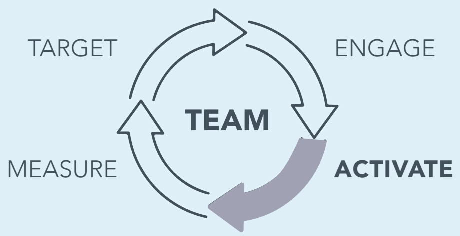
The Terminus TEAM Framework



Check the platform features that apply:

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

ACTIVATE

Program Name: *New Consumer Brands Product, Pipeline Acceleration*

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

Create Salesforce Engagement Spike report for Opportunity Owners 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.

Which key data points will sales teams retrieve or receive?

Engagement Spike Notifications,
Campaign Response Data
Relationship scores

What is the cadence for attaining data?

Spike notifications are delivered automatically on a weekly basis. Other Account-based Ad campaign and event response information will be updated in real time in the Hub and in Sales Insights.

What is the desired sales action?

View reports and work closely with field marketing and demand gen to understand account engagement to tailor messaging and close the deal.

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

Mary, Marketing Operations

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

Mary, Marketing Operations, Austin, Field Marketing, Gina, Demand Gen, Lisa, ADR Manager

Which team members are involved?

Gina, Demand Gen and Austin, Field Marketing program oversight

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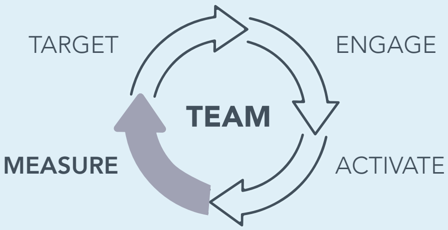
The Terminus TEAM Framework



Check the platform features that apply:

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

MEASURE

Program Name: *New Consumer Brands Product, Pipeline Acceleration*

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

ABM Dashboard, Multi-Touch Attribution, Campaign Analytics, Relationship Scores

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

# of Executive Dinner Registrations
# of Overall increased Campaign Responses within Accounts
# of Accounts with Engagement Spike
 # Opportunities progressing to later stages
# of Closed Won Opportunities
Opportunity Velocity vs. Control Group

How often will these be measured?

Results for Executive Dinner Registrations will be measured weekly, All other metrics are measured monthly.

Which team members are involved in measurement?

Marketing Operations will manage the program reporting, full team responsible for reviewing data and iterating regularly.

When will results be reported to the greater team?

Results will be reported to the greater team on a monthly basis.

Other Notes

Team should leverage the earlier indicators of campaign responses and engagement spike to understand if the overall program is increasing engagement and creating more breadth in account penetration.

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USE CASE

CUSTOMER EXPANSION

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EXPANSION:

Increasing revenue from existing customer base by improving retention or optimizing cross-sell and upsell opportunities. Focused on introducing new products, onboarding new business units, and increasing adoption.

EXPANSION

- Retain More Customers
- Land & Expand
- Cross-Sell New Products

COMMON GOALS:

Customer Retention
Maintaining revenue within existing customer accounts through regular engagement.

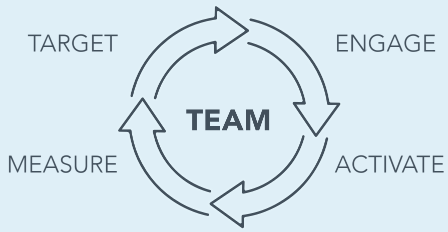
Cross Sell & Upsell
Introduce additional products or offerings to existing buying centers in client accounts.

Land & Expand
Introduce products and offerings to new buying centers within existing client accounts.

POTENTIAL TEAM MEMBERS INVOLVED IN ACQUISITION STRATEGIES:

- Customer Marketing
- Marketing Operations
- Customer Success
- Account Executives
- Customer Success Ops

The Terminus TEAM Framework



Primary Program Manager
Megan Beck, Customer Marketing Manager

Overall Program Budget
$40,000

Length of Program
Q1 & Q2

Platforms Leveraged
Terminus, SFDC, Gainsight, Pendo & Sendoso

What is the Overarching Goal of the Program?

ACQUISITION ACCELERATION **EXPANSION**

Program Name

First Half Customer Retention

Describe the Program

Program designed to support the Customer Success and Account Management teams drive retention throughout the at-risk customer base. Efforts will be targeted to customers who have a renewal date in Q1 & Q2, with adoption below the 50th percentile and a health score of yellow or red.

Desired Outcome

Increase our products' stickiness by promoting additional feature option and increasing retention by 10% within our at-risk accounts.

Key Internal Stakeholders

Customer Marketing, Chief Customer Officer, C-Suite Executives

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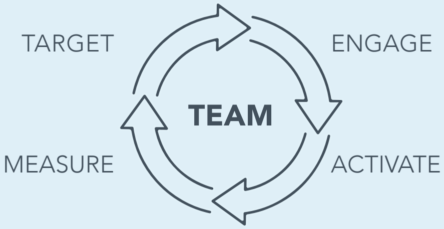
The Terminus TEAM Framework



Program Overview

Program Name

First Half Customer Retention

Define the Control Group

Customers with green health scores, adoption above the 50th percentile with renewals in Q1 & Q2. Customers with relationship scores 80 or above.

Identify Accounts or Efforts that are not in Scope

Customers in the control group will not be targeted in this program.

Other Notes

Program will help team determine if multi-channel nurturing of at-risk customers can put at-risk accounts in better overall customer health than our current good-fit, healthy customers.

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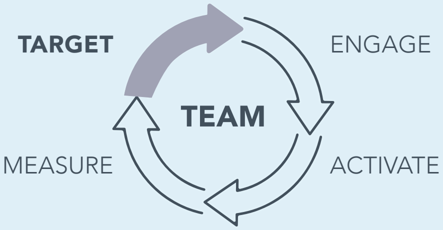
The Terminus TEAM Framework



Check the platform features that apply:

- [X] Terminus Account Hub
- [ ] Intent Data: Bombora
- [ ] Intent Data: G2
- [X] Terminus Relationship Data

TARGET

Program Name: *First Half Customer Retention*

Which accounts will you Target?

Current Customers with platform utilization below 50% and renewal dates of Q1 & Q2

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

Megan, Customer Marketer

Andrew, Customer Success Operations

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

Current customers with a Q1/Q2 renewal date platform utilization is below 50%.

What data sources will you leverage?

Pendo, Salesforce, and Gainsight

How often will you update the accounts in the list?

Monthly based on renewal dates and active customer status.

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

Customer Success Operations

Other Notes

None

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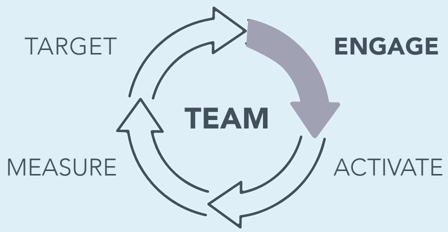
The Terminus TEAM Framework



Check the platform features that apply:

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

ENGAGE

Program Name: *First Half Customer Retention*

What strategies will you leverage to Engage the identified accounts?

Terminus Ads, Executive Outreach, Customer Delight Direct Mailers Orchestrated CSM Nurture

What is the messaging for the outreach?

Highlight high value platform features and customer win case stories.

Which assets will be leveraged?

Customer Story #4, Customer Webinar with Acme, Customer specific Uberflip, Product Release Page

Which team members are involved?

Customer Success Operations, Customer Success Managers and Customer Success Ops and Executives

What platforms will be leveraged?

Terminus, Sendoso, Uberflip, Gainsight

Who is responsible for orchestration?

Megan will execute Terminus Ads, Customer Delight and the CSM Nurture through Gainsight. The executive team will manage their own outreach via email and phone calls.

Other Notes

Customer Success Managers will be responsible for determining who should be involved in executive outreach and coordinate for each of their accounts.

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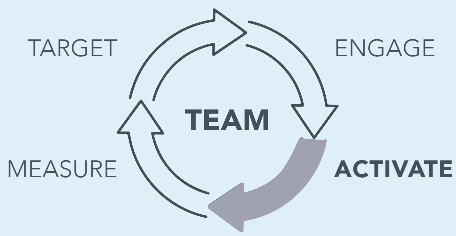
The Terminus TEAM Framework



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- [x] Terminus Sales Insights
- [x] Chat from Anywhere
- [x] Email Banner Clicks

ACTIVATE

Program Name: *First Half Customer Retention*

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

The CSM team will receive data in SFDC through Sales Insights and the Account Hub with a list filtered by CSM Owner. Data is automatically updated and they should use this data on a weekly basis to understand changes in activity across at-risk accounts.

Which key data points will sales teams retrieve or receive?

Web engagement data, Engagement Spike and Webinar Campaign Responses, Relationship scores

What is the cadence for attaining data?

The data is refreshed automatically, team should access it weekly.

What is the desired sales action?

CSMs should utilize data from campaign responses and Terminus campaign engagement to identify upsell opps that would help with retention (Pro Services, Additional Product Modules)

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

Customer Success Ops

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

Andrew, Customer Success Ops and CSM team

Which team members are involved?

Megan, Customer Marketing Manager

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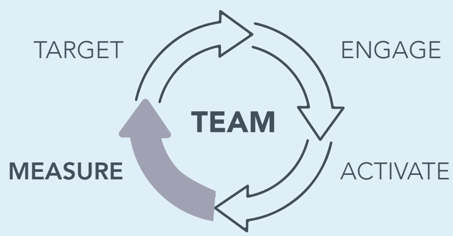
The Terminus TEAM Framework



Check the platform features that apply:

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

MEASURE

Program Name: *First Half Customer Retention*

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

Account Hub, Account-Based ScoreCard Filtered by renewal Opps only, Pendo usage data, Advanced Analytics for Campaign optimization, Relationship scores

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

# of campaign responses

% of closed won renewals

% of new features adopted

How often will these be measured?

Weekly measurement of the program, Optimizations will be made as trends begin.

Which team members are involved in measurement?

Megan, Customer Marketing Manager, Andrew, Customer Success Opps, Leadership

When will results be reported to the greater team?

Retention & Expanded Adoption results will be reported Quarterly. Overall account engagement and responses will be reported monthly.

Other Notes

N/A

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Additional Notes

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Additional Notes

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Additional Notes

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