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# Drive Demand at Key Accounts via Account-Based Strategy



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**Greg Hessong**

Sr Director, Advisory



**Dan Gottlieb**

Director Analyst



# Pipeline Innovators: Today's Agenda



Intro to the Forum



Ground rules and logistics



Featured speaker: **Greg Hessong, Sr. Director Advisor, Gartner**



Q&A

# What do Pipeline Innovators have in common...

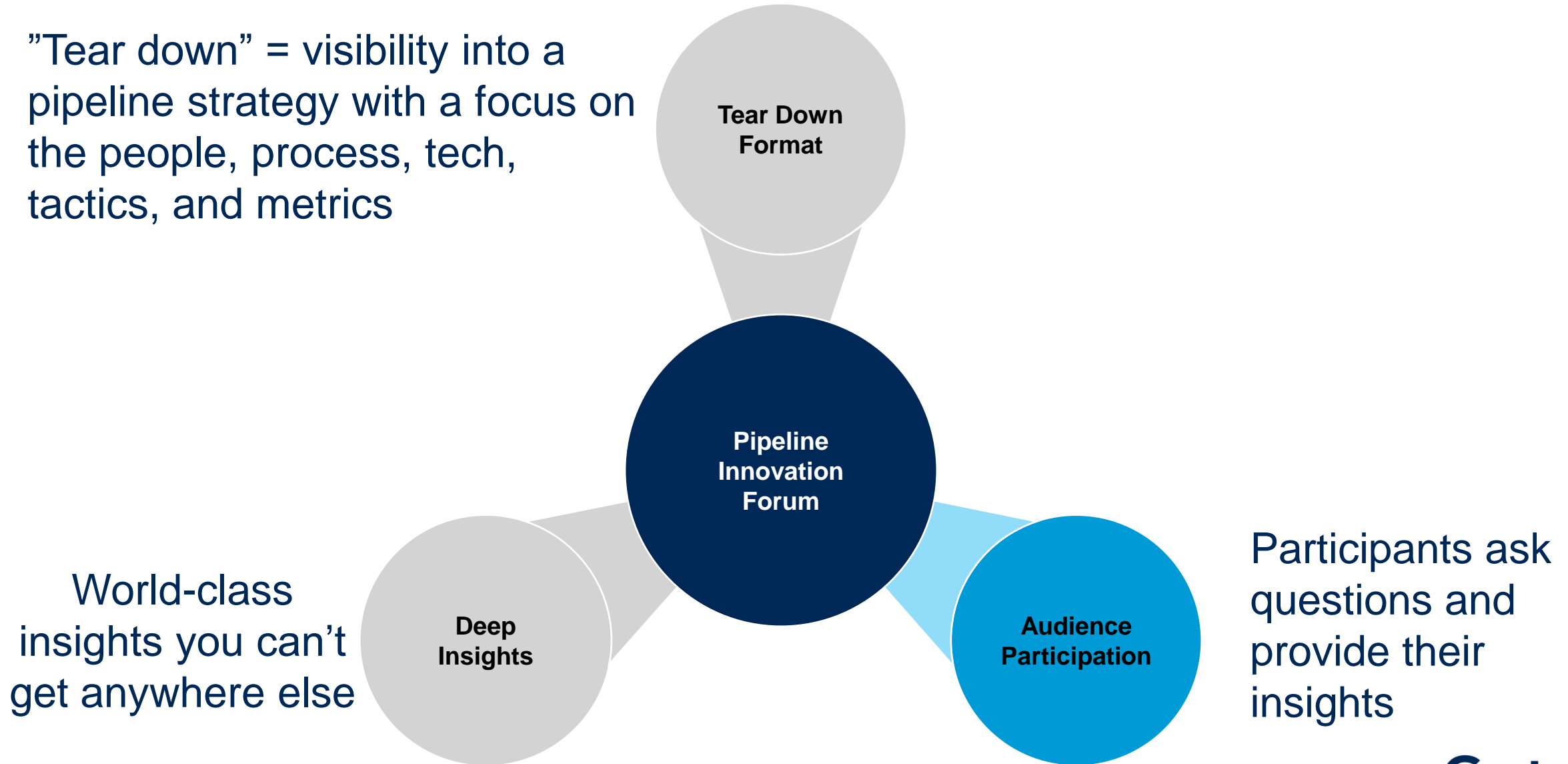
The process of developing novel methods to increase potential sales opportunities



|  |                                    |                        |
|--|------------------------------------|------------------------|
| <b>Sales and marketing integration</b> | <b>Segmented Pipeline Strategy</b> | <b>Data-Driven</b>     |
| <b>Robust Tech Stack</b>               | <b>Buyer-centric</b>               | <b>Hyper-Automated</b> |

# Why Pipeline Innovators Meetings Work

"Tear down" = visibility into a pipeline strategy with a focus on the people, process, tech, tactics, and metrics



# Ground Rules and Logistics

1. To ask a question or make a comment, type a question in the Q&A
2. All participants currently in listen-only mode (i.e., muted)
3. If you're having trouble with audio over the internet, use the dial-in number
4. Each session runs no more than 60 minutes
5. This is a learning process. Feedback/Suggestions welcome!

# Over to you, Greg!

**72% of organizations cite improving pipeline creation as their top priority**

n = 69 CSOs

Source: Gartner's CSO Priorities Pulse Survey — H2 2021

# Pipeline generation is the **No. 1 priority** for new sales technology investments

n = 69 CSOs

Source: Gartner's CSO Priorities Pulse Survey — H2 2021



**70%** of reps cite access to stakeholders as their top challenge<sup>a</sup>



**17%** of the buying process is spent meeting with sales<sup>b</sup>



**66%** of B2B buyers prefer a rep-free sales experience<sup>c</sup>

n = 285

Source: [Key Virtual Selling Challenges Sales Enablement Must Solve \(G00745647\)](#); <sup>a</sup>

[5 Ways the Shift in B2B Buying Will Reconfigure B2B Selling \(G00737874\)](#); <sup>b</sup>

2021 Gartner B2B Buyer Survey<sup>c</sup>



**Cross-functional execution  
is mandatory to counter  
declining engagement**

# Cross-Functional Alignment Is Increasing

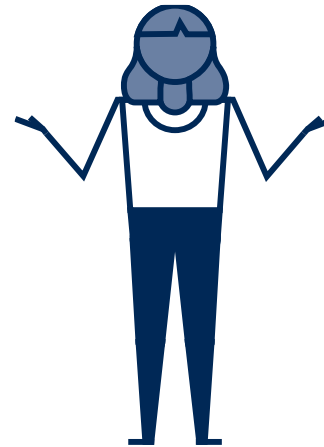
**6 in 10 CSO's spend more time with marketing than before the pandemic.\***

# But Alignment Is Hard Too

Sales-marketing misalignment is estimated to cost businesses more than **\$1 trillion each year\***

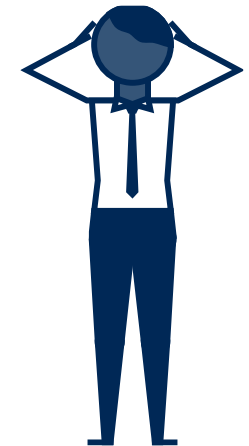
**90% of sales and marketing** professionals report misalignment in terms of strategy, process, culture and content in their organizations\*

Why is sales not following up on new leads?



Marketing

These “leads” aren’t qualified



Sales

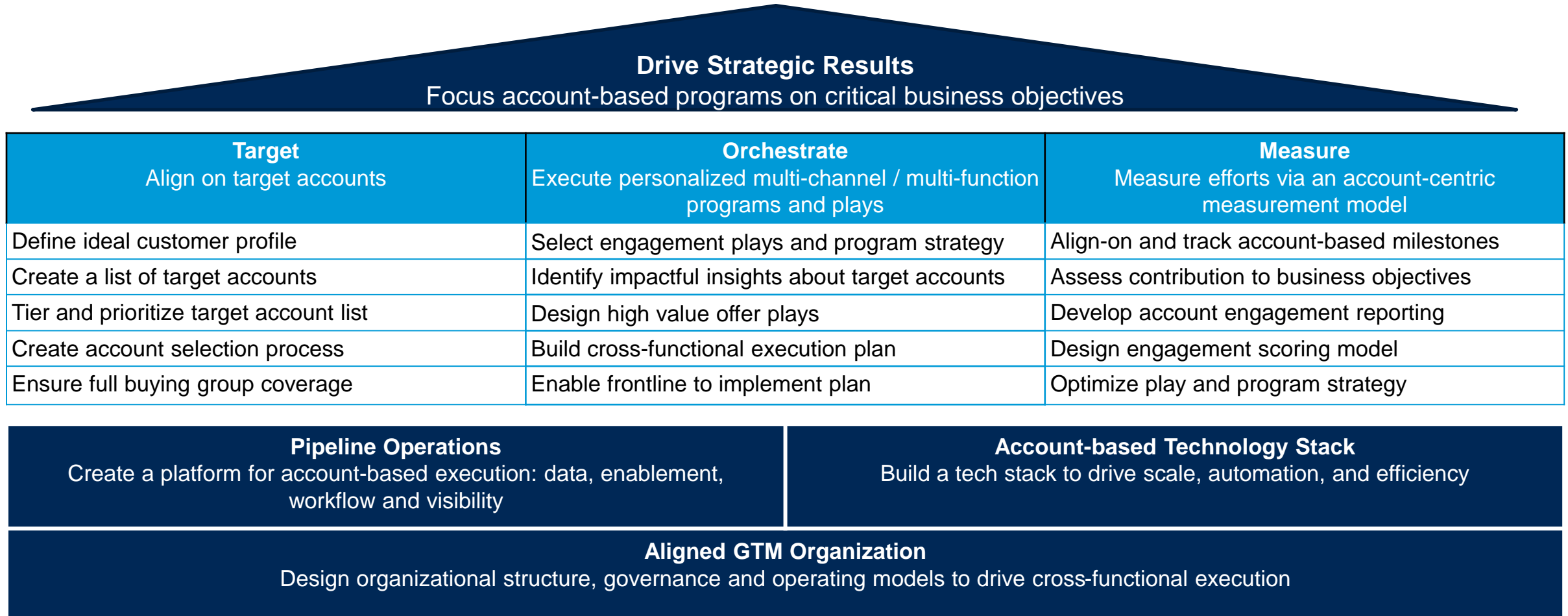
Source: [Are Your Marketing and Sales Teams on the Same Page?](#) Harvard Business Review.

**Account-based** is the coordination of valuable, relevant experiences delivered across all functions to drive engagement and conversion at a targeted set of accounts.

# Account-Based Strategy Is ...



# Account-Based Strategy Has a Proven Framework



*\*Many of the concepts presented in this framework will be explored throughout the presentation*

# Account-Based Brings Siloed Functions Together



| From                               | To  |
|------------------------------------|---|
| Loosely defined targeting criteria | Shared focus on specific high priority accounts |
| Uncoordinated outreach             | Highly orchestrated across GTM functions        |
| Marketing generated leads          | All hands-on deck to drive engagement           |
| General content                    | Relevant, timely and high value experiences     |
| General messaging                  | Insight-driven, account and contact specific    |
| Lead-based demand metrics          | Account-centric measurement                     |

# Account-Based Drives Noteworthy Results



**60%** have seen meaningful pipeline lift<sup>a</sup>



**41%** increased deal size and win rate<sup>b</sup>



**3.2x** increase in key account customer spend<sup>c</sup>

Source: [Emerging Technology Analysis: Leveraging Intent Data for Marketing and Demand Generation](#) (G00451392);<sup>a</sup> [How to Measure Account-Based Marketing Success](#) (G00739842);<sup>b</sup> Gartner Key Account Benchmarking Survey (757240\_C)<sup>c</sup>

# 3 Keys to an Account-Based Pipeline Strategy



**Align on Priority  
Target Accounts**



**High Value Offers**



**Cross-Functional  
Orchestration**

# 3 Keys to an Account-Based Pipeline Strategy



**Align on Priority  
Target Accounts**

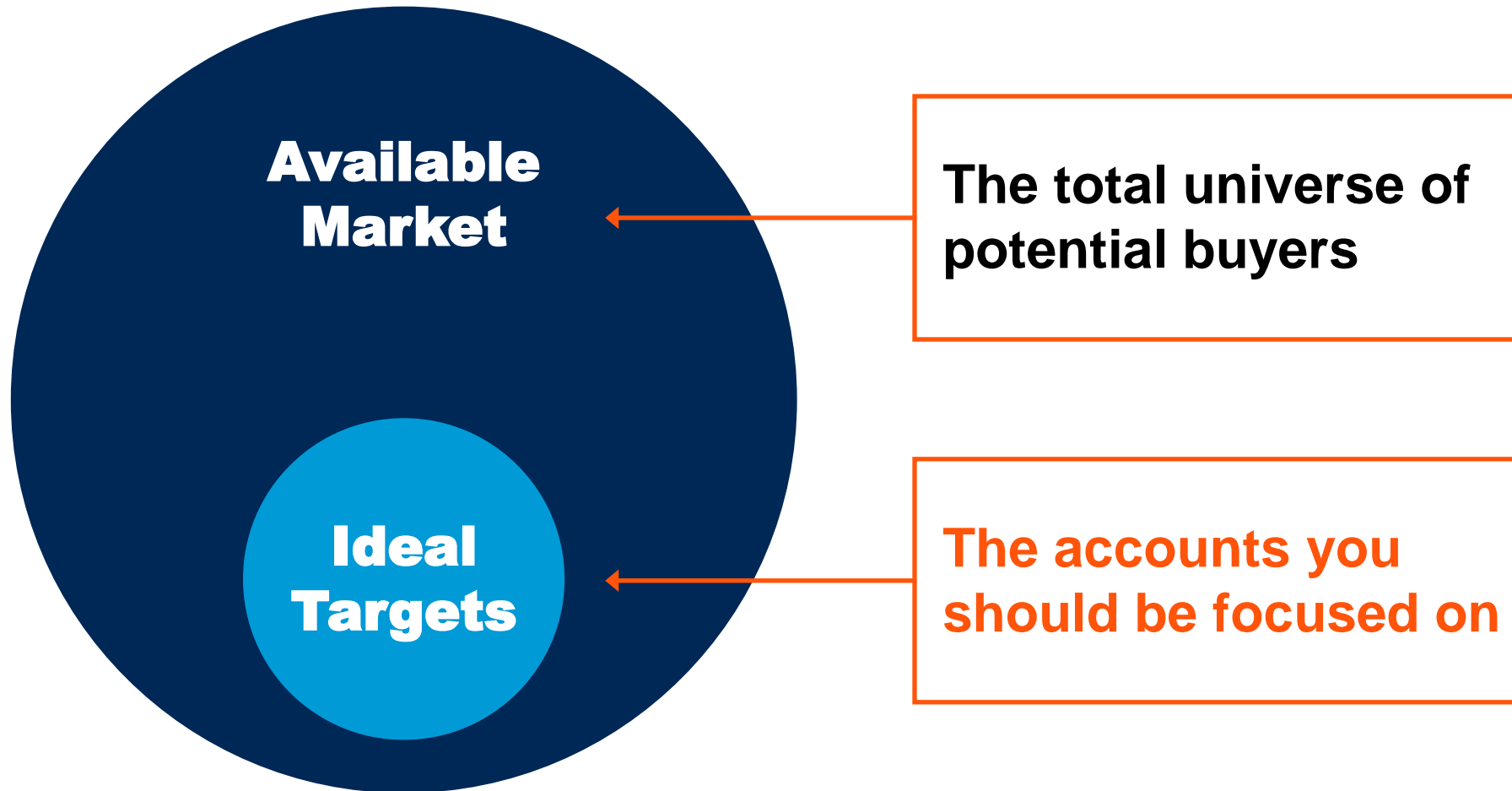


**High Value Offers**

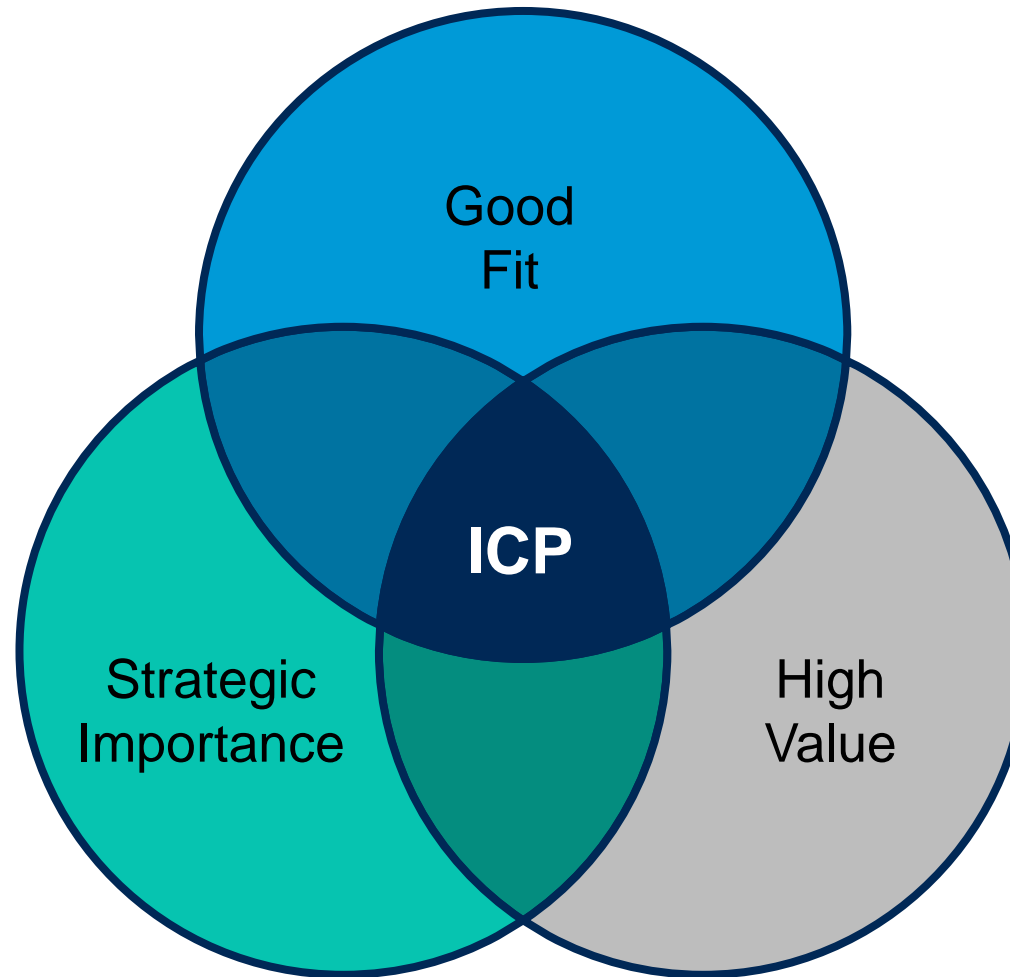


**Cross-Functional  
Orchestration**

# Alignment Begins With Clear Focus



# Identify Your Ideal Customer Profile (ICP)



# Gather ICP Inputs From All Available Sources

## Key Questions

- Where do we win most often?
- Which accounts have larger deal sizes?
- Which accounts are less likely to churn?
- Which have high growth potential?
- Strongest partnership potential?
- Where is new demand coming from?



# Define Your Ideal Customer Profile

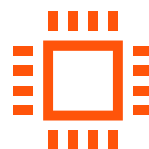
## Illustrative Enterprise ICP Attributes

### Firmographics



Large, private U.S.-based hospital system with more than 1,000 employees

### Technographics



Significant investments in facilities management and environment, health and safety software

### Business Situation



Established sustainability; highly regulated, especially relating to operating risk and safety

### Business and Operating Model



Prioritizing sustainability; highly regulated, especially relating to operating risk and safety

### Psychographics



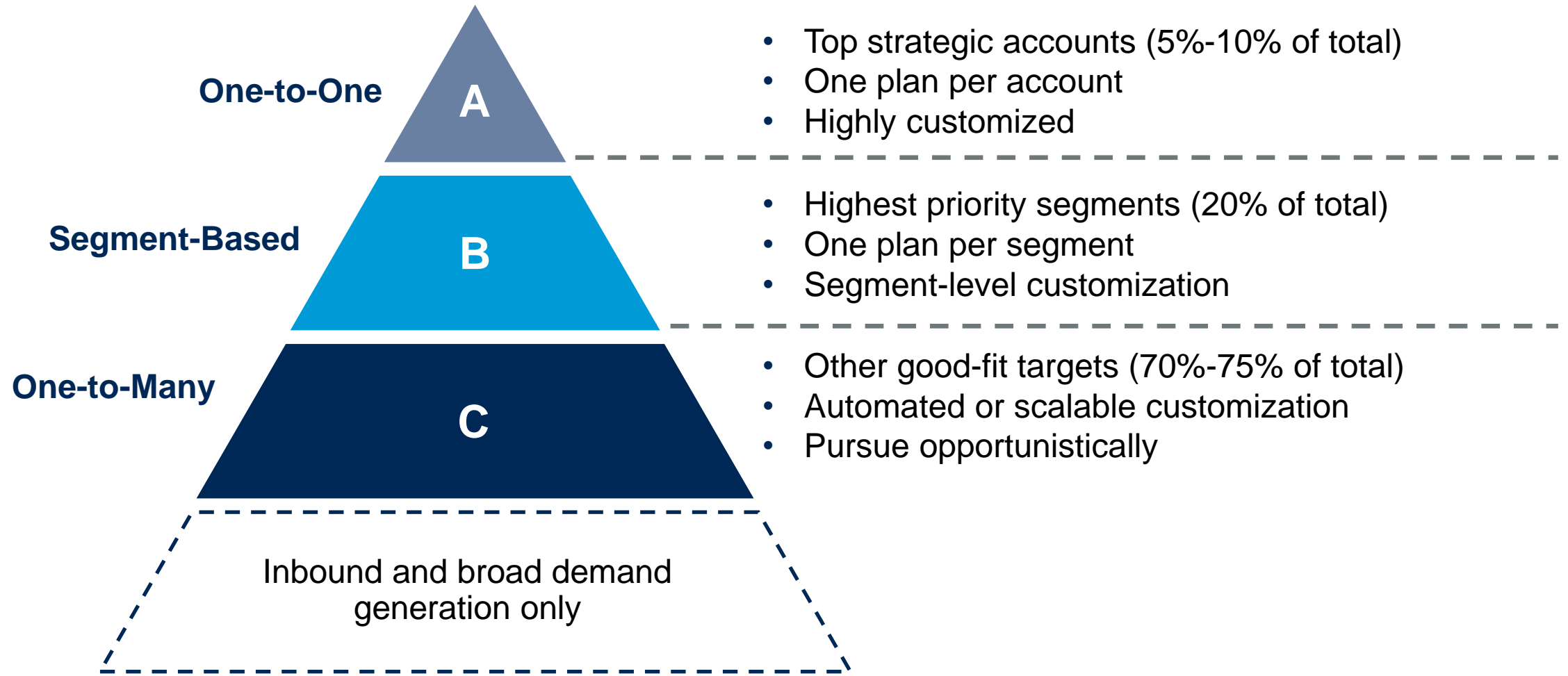
Disciplined approach to incorporating new products and services, prioritizing decisions around patient care and safety

### Resources



Large, in-house facilities team

# Tiers Align to Account Value



# 3 Keys to an Account-Based Pipeline Strategy



**Align on Priority  
Target Accounts**



**High Value Offers**



**Cross-Functional  
Orchestration**

**A High Value Offer (HVO) is a sales meeting that provides such unique and timely business value that it compels a prospect to engage**

# Build Programs to Support the High-Value Offer (HVO)



# Build HVOs That Deliver Undeniable Value

High-value offers leverage **account insights and situational awareness** to customize offers that compel accounts to engage.



## Market Trends, Data or Vision

Inform or challenge a buyer with the latest market vision, proprietary or third-party data and analysis.



## Peer Use Cases

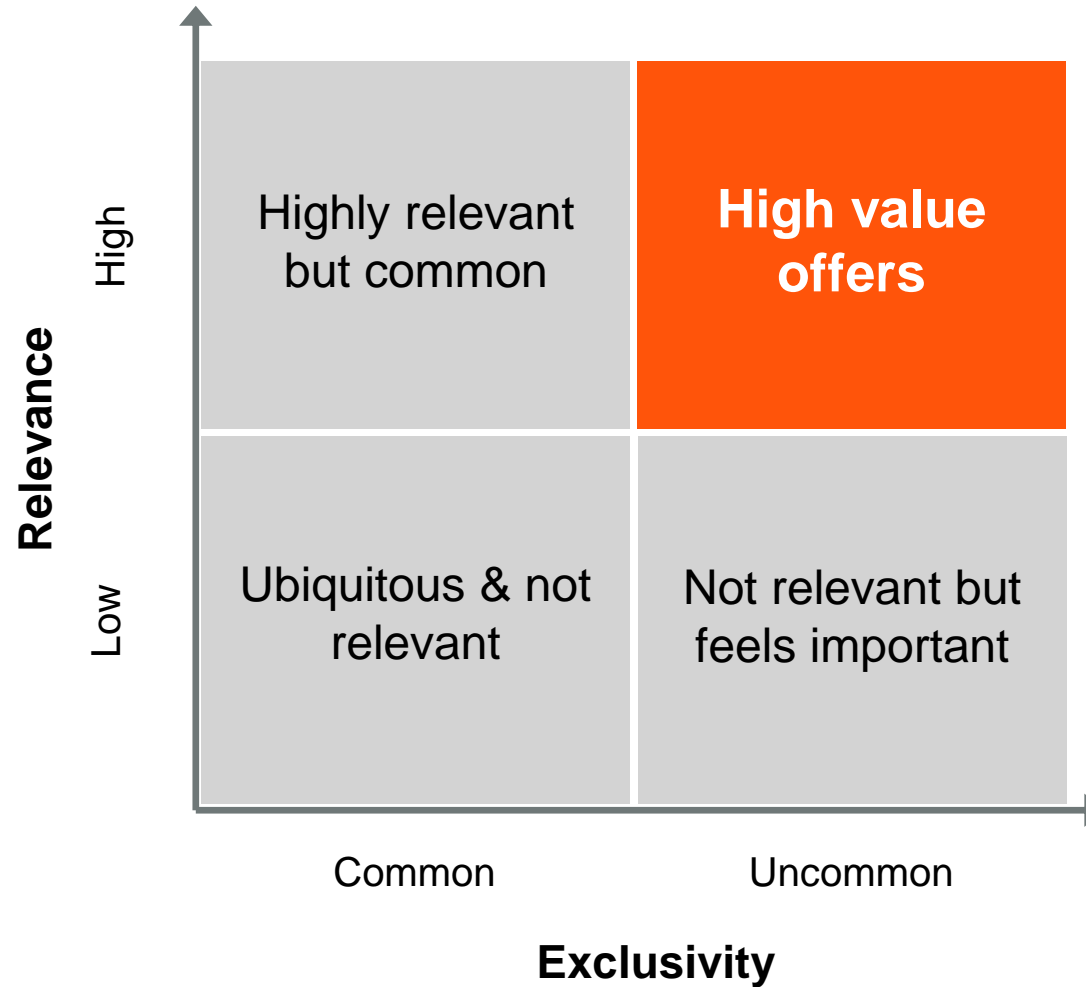
Share stories from industry peers with similar challenges, processes, tactics and tools.



## Subject Matter Expert Sessions

Solve buyer challenges by offering a point of view and a collaborative plan of action.

# What Creates High Value?

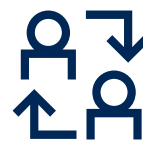


Timely and relevant content or experience with a unique POV that exceeds buyer expectations

# Identify the HVO Type That Delivers What Buyers Need in the Moment



**SME planning workshop**



**Exec-to-exec meeting**



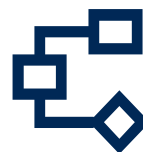
**Custom ROI or  
benchmark report review**



**Market trends report**



**Presentation from industry peer**



**Technical feasibility workshop**

# 3 Keys to an Account-Based Pipeline Strategy



**Align on Priority  
Target Accounts**



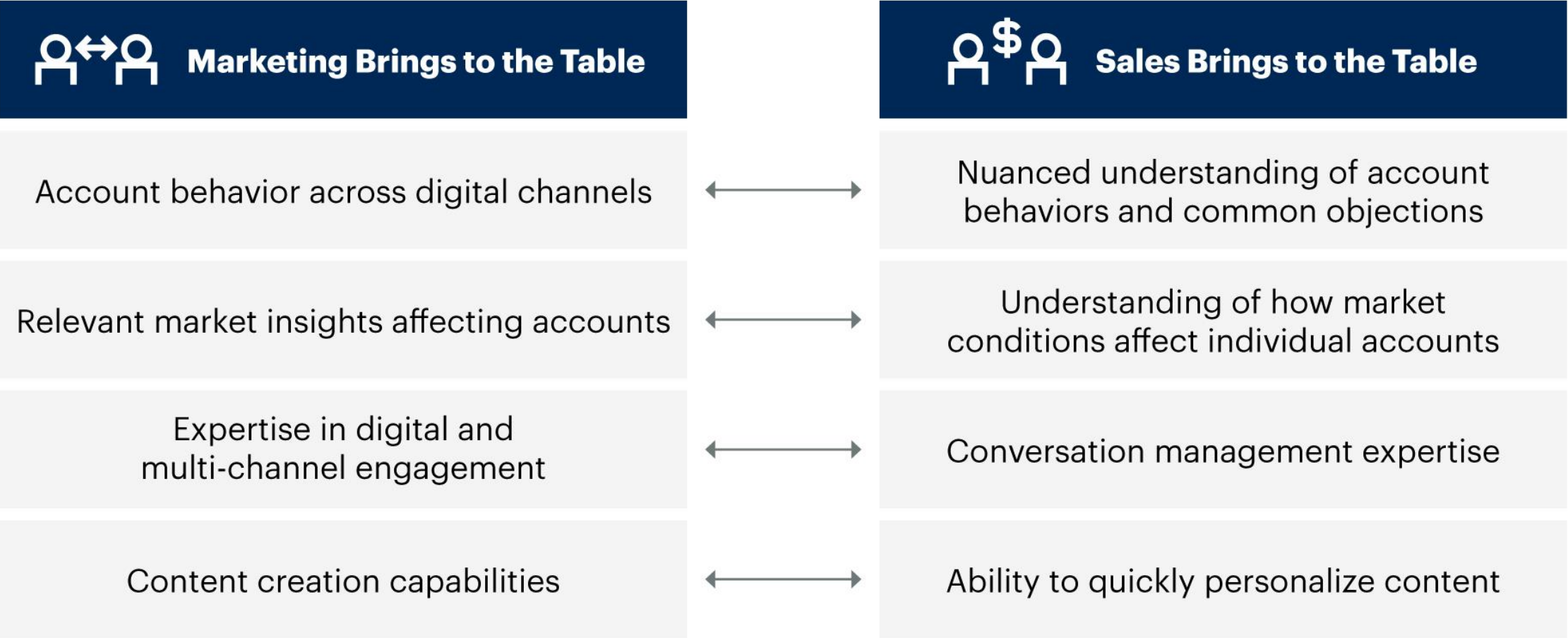
**High Value Offers**



**Cross-Functional  
Orchestration**







**Cross-functional orchestration**  
**coordinates outreach centered**  
**on a high-value offer**

# Cross-Functional Expertise



Source: Gartner

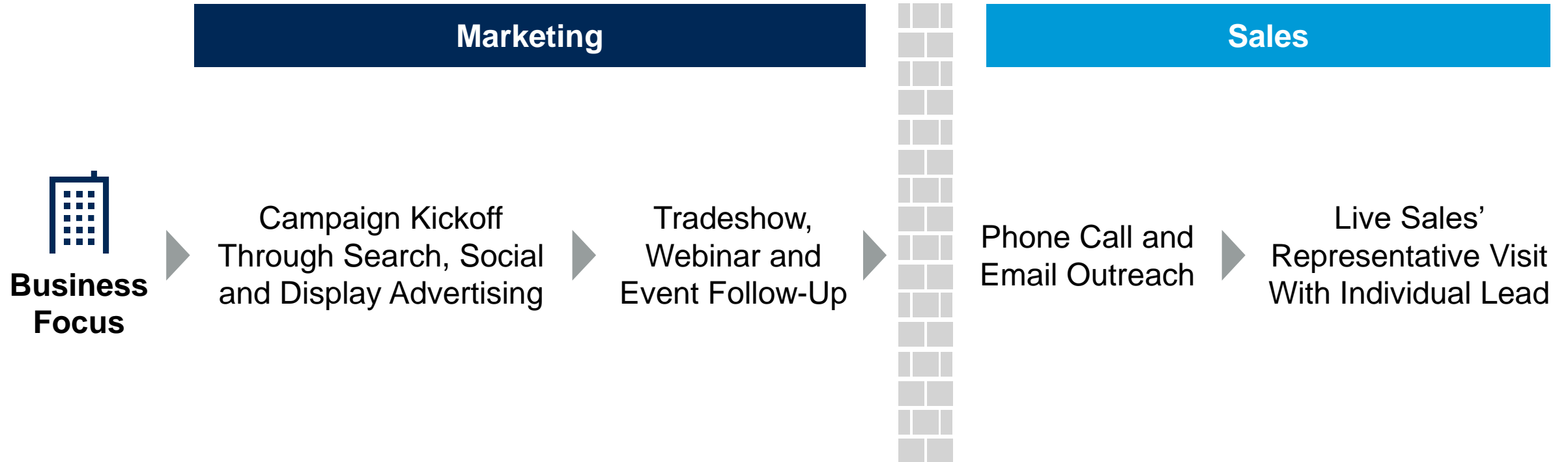
# Multichannel Outreach Increases Engagement

|  |  |
|--|--|
|  <b>People</b>            | Who, inside your organization, will plan and execute account-based strategies? |
|  <b>Targets</b>           | Within an account, which stakeholders will you engage?                         |
|  <b>Touches</b>           | How many touches will you need to meet your objective?                         |
|  <b>Channels</b>          | Where do your customers spend time and how do they learn?                      |
|  <b>Timing</b>           | What cadence will message delivery and campaigns follow?                       |
|  <b>Personalization</b> | How will you ensure resonance with different customer stakeholders?            |

Source: Gartner

# “Traditional” Engagement Playbook

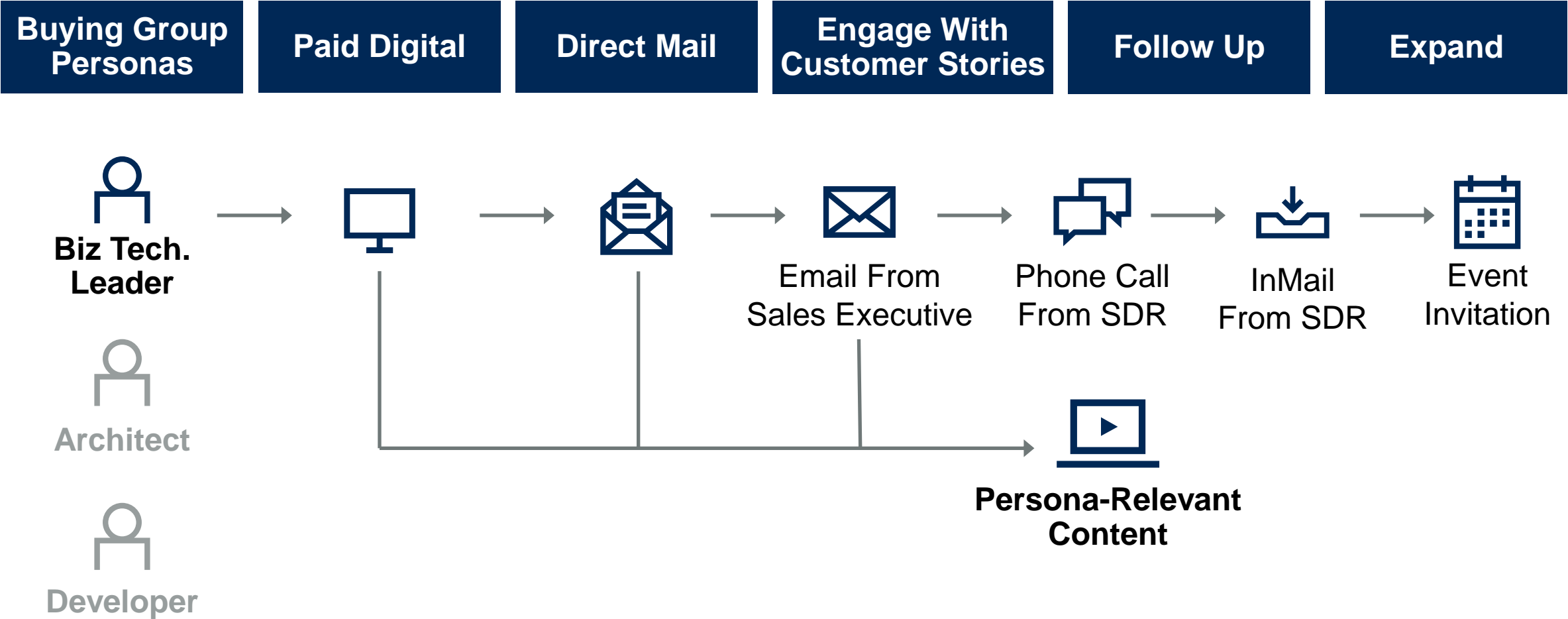
Illustrative



Source: Gartner

# Orchestrate Your Engagement “Plays”

Sample “Play”, Adapted from Couchbase



Source: B2B Marketing; Gartner Analysis

# Cross-Functional Orchestration Plan

| Day                     | 1 | 2 | 3 | 4 | 5 |   |   | 6 | 7 | 8 | 9 | 10 |   |   | 11 | 12 | 13 | 14 | 15 |   |   | 16 | 17 | 18 | 19 | 20 |   |   | 21 | 22 | 23 | 24 | 25 |   |   | 26 | 27 | 28 | 29 | 30 |
|-------------------------|---|---|---|---|---|---|---|---|---|---|---|----|---|---|----|----|----|----|----|---|---|----|----|----|----|----|---|---|----|----|----|----|----|---|---|----|----|----|----|----|
| Marketing Air Cover     |   |   |   |   |   |   |   |   |   |   |   |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |
| Digital Advertising     | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ●  | ● | ● | ●  | ●  | ●  | ●  | ●  | ● | ● | ●  | ●  | ●  | ●  | ●  | ● | ● | ●  | ●  | ●  | ●  | ●  | ● | ● | ●  | ●  | ●  | ●  |    |
| Website Personalization | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ●  | ● | ● | ●  | ●  | ●  | ●  | ●  | ● | ● | ●  | ●  | ●  | ●  | ●  | ● | ● | ●  | ●  | ●  | ●  | ●  | ● | ● | ●  | ●  | ●  | ●  |    |
| Marketing Email         |   |   |   |   | ● |   |   |   |   |   |   |    |   |   |    |    |    |    | ●  |   |   |    |    |    |    |    |   |   |    |    | ●  |    |    |   |   |    |    |    |    |    |
| Pre-Outbound            |   |   |   |   |   |   |   |   |   |   |   |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |
| Direct Mail             |   |   | ● |   |   |   |   |   |   |   |   |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |
| Executive Outreach      | ● |   |   |   |   |   |   |   |   |   |   |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |
| Outbound                |   |   |   |   |   |   |   |   |   |   |   |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |
| SDR Email               |   |   |   |   |   |   |   | ● |   |   | ● |    |   |   | ●  |    |    | ●  |    |   |   |    |    |    |    |    |   |   | ●  |    | ●  |    |    |   |   |    |    | ●  |    |    |
| SDR Phone               |   |   |   |   |   |   |   | ● | ● |   |   |    |   |   | ●  |    |    | ●  |    |   | ● |    |    |    |    |    |   |   | ●  | ●  |    | ●  |    |   |   |    |    | ●  |    |    |
| SDR LinkedIn            |   |   |   |   |   |   |   | ● | ● |   |   |    |   |   | ●  |    |    |    |    |   |   |    |    |    |    |    |   |   | ●  |    |    |    |    |   |   |    |    |    |    |    |
| SDR Video               |   |   |   |   |   |   |   |   |   |   |   |    |   |   | ●  |    |    |    |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |   |   |    |    |    |    |    |

Source: Gartner

**Account-based strategy focuses  
existing resources for maximum impact.**

# 3 Keys to an Account-Based Pipeline Strategy



**Align on Priority  
Target Accounts**



**High Value Offers**



**Cross-Functional  
Orchestration**

# Recommendations

- ④ Assemble a cross-functional team to define your **Ideal Customer Profile (ICP)**
- ④ Review available **account insights** to understand the current situation for each high priority account
- ④ Identify or develop **High Value Offers (HVOs)** that target accounts can't refuse
- ④ Develop a **cross-functional orchestration plan** to drive engagement and generate new pipeline

# Ask your questions



The image shows a web interface for asking questions. At the top, there is a horizontal navigation bar with four tabs: 'Ask a question', 'Attachments', 'Rate this', and 'Details'. The 'Ask a question' tab is highlighted with an orange border, and an orange arrow points to it from the left. Below the tabs, the heading 'Ask a question' is displayed. Underneath the heading is a large text input area with a placeholder text 'Type your question here...'. At the bottom right of the form, there is a 'Send Question' button, which is also highlighted with an orange border and an orange arrow points to it from the left.

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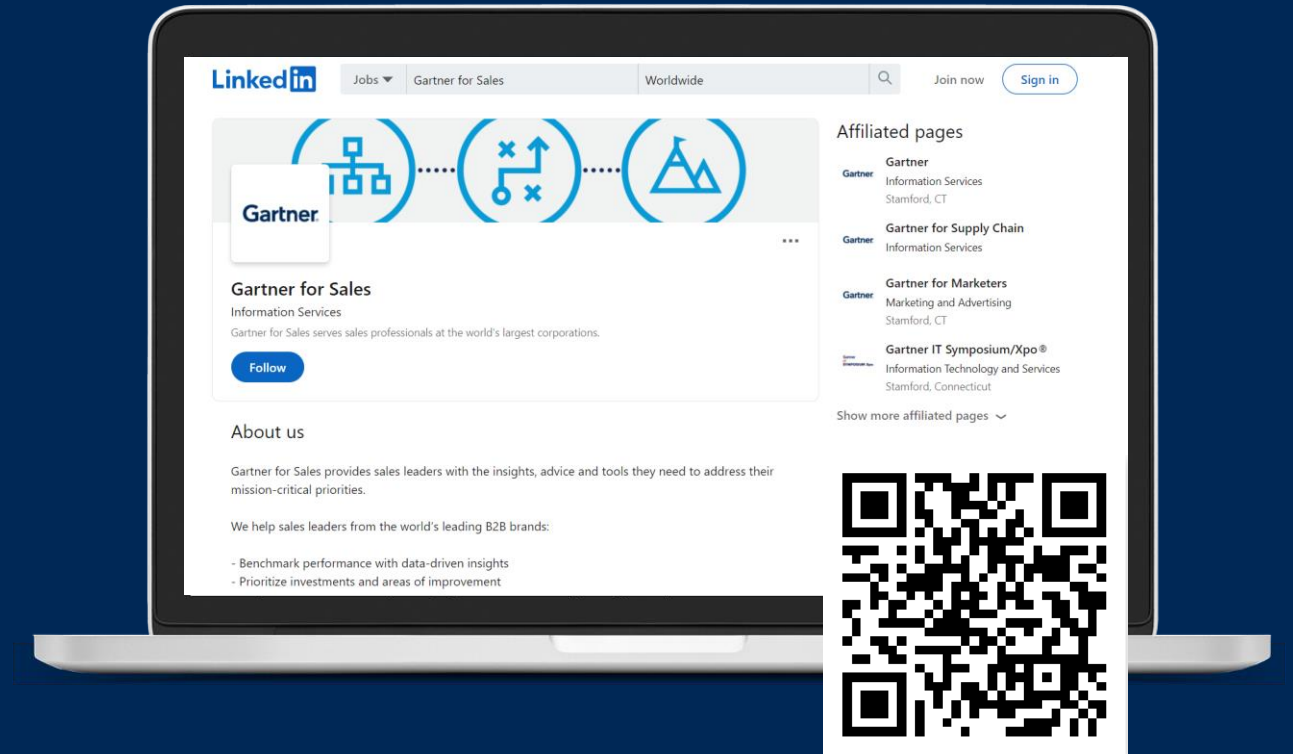


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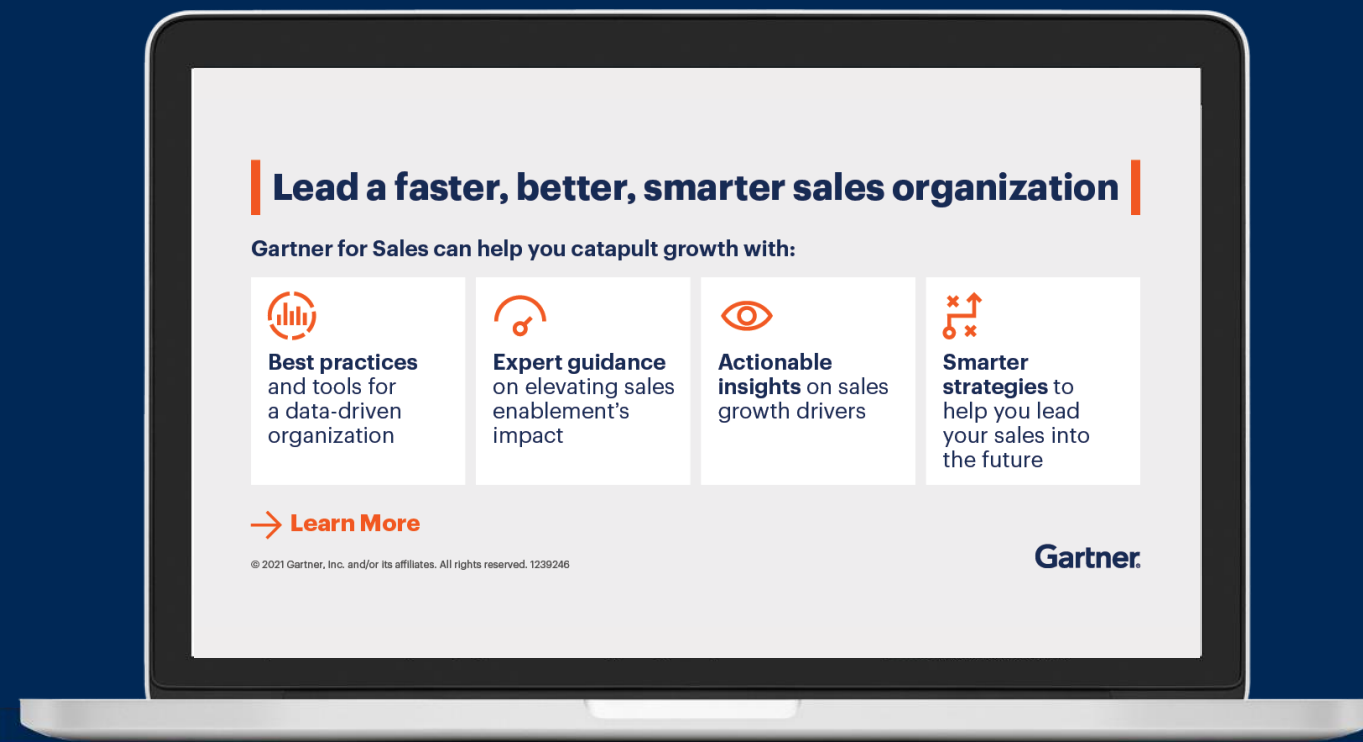
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