ABM Buying Guide:
How to Choose the Right Solution For You
Why account engagement, and not just ABM?

Account-based marketing (ABM) has become one of the hottest trends in B2B sales and marketing in recent years, and today the category is flooded with vendors that say they deliver account-based results. But these point solutions aren’t positioned to help organizations make the transformational shift to a comprehensive account-centric approach that aligns sales, marketing, and customer success as a unified revenue team.

While the capabilities delivered by point ABM solutions are often important components of an account-based engagement strategy, the market is clearly moving towards comprehensive platforms. As noted in The Forrester New Wave™: ABM Platforms, Q2 2020, “Although the landscape of vendors offering solutions that can support an ABM strategy is increasing in size and complexity, users (and investors) are placing a clear bet on ABM platforms that address multiple elements of the ABM process and promise quicker time-to-value than point solutions.”

The Request For Proposal process has many challenges that can make it difficult to identify the best solution for your needs. Yes, you have a list of requirements or features thoroughly researched from vendor sites and notes from meetings with analyst firms. But what those review sites or notes may not provide is how to validate vendor claims.

Knowing the questions to ask is only half the job. Understanding what the answers mean for your business is how you can best determine if the solution is right for your account engagement strategy. We suggest that the P in RFP be changed to mean proof — and that you ask your shortlist of vendors to prove their claims.
Comprehensive account-based engagement platforms align sales, marketing, and customer success on which accounts and contacts to pursue — all based on accurate (and continually refreshed) insights, like which accounts meet your ideal customer profile (ICP) and are in-market to make a purchase decision. With the right account engagement platform, your revenue team can achieve breakthrough results like:

• Sales and marketing aligned on the same data and insights. No more disputes over data, metrics, or lead quality.

• Meeting and exceeding pipeline and revenue targets by having a consistent definition of your ICP and what is a “good” account.

• Prioritizing the best-fit, most engaged accounts for outreach so your team no longer spends time and money on poor-fit accounts — or accounts not in-market to make a purchase decision.

• Engaging the right buyers with relevant, personalized messages throughout their journey — and measuring real pipeline and revenue results.

Laying the Groundwork for a Strategic Transformation

By now, you might be wondering what you are getting into. What’s the payoff for the effort of reading this guide, and what kind of results should you expect from embracing an orchestrated account engagement strategy?

To put it in perspective, 6sense customers achieve results like 75% higher lead-to-opportunity conversion rates, 40% higher opportunity-to-closed business conversion rates, and 50% higher contract values than historical average. The desire to achieve similar results is likely why you’re on this journey in the first place.

What follows are topics to consider when developing a request for proof document to address the unique needs and goals of your organization — and help you select the right platform to achieve breakthrough results. The topics are broken down by the five key steps of orchestrated account engagement, each of which is essential to align sales, marketing, and customer success on the best accounts and contacts to pursue — and when to pursue them.

While requirements for a system should be based on how your company works, transforming from a lead-based approach to orchestrated account engagement requires different ways of working. Note that this guide does not include an exhaustive list of criteria to evaluate, but rather a calibrated view on what high-performing revenue teams focus on to be successful with an account engagement platform.
Who can we successfully sell to? What accounts are most likely to buy? Are these industries we traditionally do well in? Are they exhibiting the right buying behavior? Whether you call it your TAM (Total Addressable Market), TAL (Target Account List), or ICP (Ideal Customer Profile - my preference), you need to know your best targets.

This means knowing something more than their industry, number of employees, or annual revenue. It means understanding their tech stack, who is on the buying committee, what they are researching, and (most importantly) where they are in their buying journey.

ABM relies on understanding your buyer personas and ICP in order to create compelling, personalized content delivered over the right channel, at the right time. From display to direct mail to BDR cadence to website experience - personalized by account, persona, and most importantly timing.

Not a hand-off or a lead “thrown over the wall” but a real partnership. The key is to provide sales with the right context and insights to help them know why, how, and when to engage.

We need to be tracking and reporting on things that actually matter and affect deal velocity and pipeline acceleration, such as new accounts engaged, new personas engaged, opportunity rate, and account win rates. Knowing what accounts and personas are engaging can open a whole new prospecting pool that you didn’t know existed.
Key Criteria

Select the best accounts

Like every good story, effectively engaging an account requires that you understand the characters and the role they play. But before running campaigns and reaching out to prospects, your sales and marketing teams first need to know which accounts are the best to pursue.

Selecting the best accounts is foundational to every subsequent engagement activity your sales and marketing teams execute. An account engagement platform should make it easy to select accounts based on ICP fit, current buying stage, intent topics or keywords, engagement data, and account firmographics and technographics.

If it feels like there’s a lot riding on this step in the process, it’s because there is. But with the right capabilities in your account engagement platform, your teams can confidently determine which accounts to target based on comprehensive data and rich insights.
Account Identification

Why it matters

Account identification is how a platform associates millions of rows of anonymous intent data with real accounts so your teams can select the best accounts to pursue.

Accurately identifying accounts is the most critical factor in understanding the total addressable market (TAM) available to your business today — in other words, the complete universe of accounts showing intent to make a purchase.

When evaluating account identification capabilities, it’s important to discuss an often misinterpreted term: match rate.

A match rate is the ability for a vendor to match IPs and other digital signals to actual accounts. As we’ll cover in the next few criteria, these signals can come from visits to your website as well as research on B2B websites.

The higher the match rate, the more accounts your team can choose from and work. Think of it like this: every percentage point less that a platform accurately identifies accounts directly correlates to hundreds if not thousands of fewer potential at-bats.

Proof

Ask vendors about their account match rate, and then request proof in the form of a match rate test. This can be done by providing a list of known IP addresses to vendors to match (note this is ideal only if you have thousands of already-matched IPs) or placing the JS tag from multiple vendors on your website for the same period of time to compare anonymous website matches.

Ask how vendor match rates are impacted by changes in the market. Ask if the vendor has patents for their technology or approach.

If you’re interested in a more technical discussion, ask whether the vendor’s matching capabilities are deterministic (think static tables of IPs and account names) or probabilistic (using AI to weigh the probability of an accurate match). A method that allows for continuous learning is ideal.

Finally, be sure to ask for customer testimonials specifically related to performance of account identification, from initial implementation to 6 months post-install.
3rd-party intent data

**Why it matters**

Third-party intent data includes buying signals picked up from known accounts (in your CRM, MAP, or other systems) as well as unknown accounts across the B2B Internet.

Buyers today start the purchase journey with anonymous research on B2B websites, so capturing 3rd-party intent signals is critical to lighting your Dark Funnel™ and uncovering your TAM of accounts showing intent — whether they're just beginning the buying journey or getting ready to make a purchase decision.

Account-based engagement platforms have different approaches to capturing 3rd-party intent, but the primary methods involve entering the keywords you want to track or selecting from a list of topics available in the platform.

**Proof**

Determine whether the vendor has its own 3rd-party intent capabilities, or if you’ll need to contract with another point solution to capture these signals.

Ask which approach is used (topic or keyword) and determine whether the platform accepts multiple types of intent from different providers. Some companies leverage multiple types of intent to enhance overall coverage.

Ask about the frequency with which intent data is refreshed to ensure your teams can act on recent data. Anything older than a few days is stale.
1st-party intent data

**Why it matters**

First-party intent data includes signals generated by visits to your website, microsites, or even your help center site. These visits can be from known or unknown accounts.

Other sources of 1st-party data include data sourced from:

- CRM
- MAP
- Marketing campaign interactions
- Sales rep email interactions
- Virtual and live events

**Proof**

Determine if the vendor captures 1st-party intent signals from your website, and if possible work with the vendor to configure the setup so you can see the capture of these signals in action.

You likely already have a MAP and CRM. Ask the vendor to show how these systems are integrated to mine 1st-party intent signals from them.

Ask how the sync between systems works — is it dynamic or static? Dynamic synchs are ideal to optimize the movement of data between systems.
Data Management

Why it matters

Harvard Business Review says that 31% of marketers have too much data to analyze, yet an account engagement strategy necessitates a lot of data — like intent, behavioral, and historical data from your MAP and CRM.

But rather than giving your team more data to analyze, your account engagement platform should have a way to aggregate, cleanse, and normalize data from multiple sources in order to power other essential platform capabilities — like predicting where accounts are on the buying journey, personalizing experiences across channels, and delivering meaningful insights to sellers and marketers.

Data management capabilities are foundational for a platform to scale as your account-based programs grow. And while it can be a difficult capability to evaluate, it’s one that can’t be overlooked.

Proof

Comprehensive account engagement platforms include an embedded customer data platform (CDP) to clean and standardize the billions of data points to create a single source of accurate, actionable data.

Depending on your needs, a standalone CDP may also be an option, although those can take months to implement and integrate. Depending on your needs and the size of your organization, this might be ok.

But no matter the size of your organization, it’s critical to have a single source of truth on accounts and contacts that’s integrated with your key first-party systems.

Ask for documentation on the vendor’s data management capabilities, and dig into integrations to understand the data their platform aggregates — and how it moves between systems. Also ask for a step-by-step demonstration on how your team can query and use data.
Data Segmentation

**Why it matters**

Segmentation capabilities are critical to selecting the best accounts based on rich data and insights. Segmentation is how your team slices the universe of accounts they could target into smaller audiences for analysis, campaigns, and outreach.

- Segmentation should be:
  - 100% self-service
  - Unlimited
  - Fast and simple

Endlessly flexible, with the ability to use any combination of data available in the system

Able to build both static and dynamic

As accounts move through the buyer’s journey, the segments an account belongs to should dynamically update based on real-time changes in account data, behavior, and predictions. Segments should power the platform’s cross-channel orchestration capabilities (more on this later).

**Proof**

Ask for a step-by-step demonstration of segment building. Note the number of clicks and screens involved in the process as well as how soon the segment is ready for use.

Also, be sure to note the filters available for segment building. Can segments be created from any combination of firmographic, technographic, intent, predictive, or behavioral data? Can the segment incorporate data from CRM and MAP integrations?

Ask how frequently segments are updated. Dynamic segments that are refreshed daily are ideal.

Finally, ask for a demo of creating both static and dynamic segments, and ask for examples of how they can be used. Can the vendor demonstrate how segments are used for key use cases like new logo acquisition, cross-sell and upsell, outbound sales, or territory expansion?
**Key Criteria**

**Know about them**

Having the data you need to select the best accounts is a critical first step, but before you begin running campaigns or unleashing sales reps, it’s important to analyze your audiences and get deep insights that help you engage them. And for this, you need more than basic account firmographics.

When you add in an account’s buying committee, data about their tech stack, the keywords or topics they’re researching, the locations showing the most activity, and the current stage of the buying journey they’re in, you now have the insights needed for strategic, relevant outreach.

With the right capabilities in your account engagement platform, your teams can quickly gain the insights needed to build campaigns and outreach strategies that engage target accounts and contacts, create positive brand awareness, and help them move through the buying journey.
ICP Fit Predictions

Why it matters

Big data alone doesn’t provide the insights needed to effectively engage accounts. For that, you need AI-driven predictions to mine your data for patterns and insights, like which accounts are a fit for your ICP.

While every organization has an understanding of the industries, company sizes, and other factors that typically make prospects a fit, AI can analyze your past sales history to uncover the patterns and characteristics that truly comprise your ICP (often things that don’t occur to humans) — and it continually refines this model as your data, company, customers, and market change.

AI-driven ICP fit predictions are essential to uncover whitespace where your team could focus efforts; prioritize resources; and align sales and marketing on the best accounts for the business.

Proof

Not every vendor offers AI-driven ICP fit predictions, so first validate whether the platform includes these capabilities. Platforms that leverage AI should have models that analyze both historical and real-time data. This analysis should be continuous to provide the best picture, as your data and market change.

Ask for a detailed explanation of:

• How the vendor’s data science team performs backtests to validate this model.

• How these backtests are performed: manually, or does the platform have automated backtest capabilities?

• How often backtests can (and should) be performed.
## Contact Fit Predictions

### Why it matters

An account engagement strategy is ultimately all about building a relationship with the right people within a target account, so it’s critical to know which contacts and personas are most important for your team to engage. The best way to achieve this is with AI that mines current and historical data to uncover the buying center for an account.

Like with ICP fit predictions, AI can uncover patterns and characteristics that aren’t evident to humans, and it continually learns as your business evolves to ensure your team always knows which contacts and personas to prioritize. These predictions also help your team identify whitespace in the buying center where additional contacts should be acquired.

Contact-level predictions give your team important insights that help optimize budget spend and outreach strategies, and when combined with other predictive capabilities enable your revenue team to engage accounts at scale.

### Proof

Not every vendor offers AI-driven contact fit predictions, so first validate whether the platform includes these capabilities — and whether they continuously leverage historical and real-time data.

Ask for a demonstration that shows where contact fit predictions and buying center analytics are available in the platform. Are they available to both sales and marketing users?
Data Enrichment

**Why it matters**

Contact data goes stale quickly. But when an ICP-fit account shows strong buying signals, it’s critical for your team to have accurate data for contacts in the buying center — and for that data to be available in core systems like MAP and CRM.

Comprehensive account-based platforms have the ability to run automated plays that enrich the buying center with missing contacts and refresh existing contacts. And since no single source of data is perfect, it’s equally important for the platform to select the best data for enriching MAP and CRM so that every call and email your team generates is more likely to reach the right decision maker. Think of it as operationalizing the intent, predictive, and other key signals so your team can act on insights with the best data available.

**Proof**

Ask for the vendor’s definition of enrichment; what data is sourced (and from how many different vendors); why and when it’s sourced; and how mismatched information is handled. It’s also worthwhile to dig into how the vendor evaluates data partners in a systematic way to ensure customers get access to quality enrichment capabilities.

The answers will likely vary between vendors, and you should know the definitions to better assess the solution against your needs.
Firmographic, Technographic, and Demographic Data

**Why it matters**
As an account-based platform captures intent signals, it needs an accurate master source of data in order to match signals to accounts. (Remember, many of the signals your platform captures will be from unknown accounts, or accounts that don’t yet exist in your CRM or MAP.)

Most vendors have a master company dataset that includes everything from industry, location, and company size to details about an account’s current technology stack. The accuracy and recency of this data is as critical as the ability to match anonymous behavior to known account names. Stale or incorrect data can lead to poor personalization, wasted budget, and even missed opportunities.

**Proof**
Accurate and comprehensive master company datasets can take years to develop, and they should continually expand and be refined. Ask for details about how long the vendor’s dataset has been in production, how many data sources it leverages, and how it validates the accuracy of continually changing data.

The vendor should have a gold standard of companies, and it’s critical to validate this any way you can. If you're running a match test as part of your vendor evaluation process, compare the results provided (like company firmographics and technographics) against your own 1st-party data or trusted 3rd-party data sources.
Key Criteria

Engage the Right Way

The previous sections of this guide covered how the right data leads to better account selection and insights. In this section we'll focus on how to build on those steps and begin engaging target accounts and contacts at scale — and which capabilities are essential to engage the right buyers at the right time across channels.
Contact Engagement Predictions

**Why it matters**

The AI-driven predictive models covered earlier in this guide focus on providing insights about which accounts and contacts are a strong fit compared to historical sales data. But equally important to those models is understanding how a contact's current level of engagement with your sales and marketing tactics compares to past opportunities. Are they highly engaged like contacts from successful past opportunities, or does your team need to double down on engaging key contacts in the buying center?

This model is essential for helping your team understand the effectiveness of engagement tactics as well as where additional efforts are needed. AI-driven contact engagement predictions should cover the buying center, and ideally, should extend to recommendations for who and when to engage next.

**Proof**

Prospect engagement scores are often confused with lead scores, so begin by asking if the vendor uses AI to measure current contact engagement levels against historical data. If not, the vendor likely offers only traditional lead scoring capabilities (e.g., webinar registration = 10 points, demo signup = 20 points) that don’t cover the full buying journey, as lead scoring applies only to known contacts — and 70% or more of the buying journey today is conducted anonymously.

Ask how the vendor’s predictive models can show where there is low or no buying center activity and how you should interpret that information. Ask also for details on use cases for using contact engagement scores to optimize sales and marketing activities.
Orchestration

Why it matters

Orchestration is a buzzword you may have heard within the ABM market. In a nutshell, it refers to a platform's ability to deliver the right message to the right account at the right time across any channel or tactic throughout the buying journey — and to do so automatically, at scale, and with minimal human intervention.

Orchestrating engagement involves selecting and targeting the right accounts, as well as the right contacts and personas within those accounts. It involves delivering not only personalized experiences, but relevant ones, based on what buyers care about (like intent keywords or topics) and where they are in the buying journey. And it involves delivering consistent messaging and experiences across channels, whether those channels are native to the vendor or powered by other parts of your tech stack.

Traditionally, revenue teams orchestrated engagement through static "journeys" built in MAP with if/then statements. But these were designed for known contacts on linear journeys mapped out by sellers. The reality is, B2B buyers remain anonymous through 70% of the buying journey — and each person on the buying team takes their own unique journey.

Successfully orchestrating account engagement requires a platform that leverages predictive, intent, behavioral, and other account data to dynamically engage the right accounts at the right time. Without these capabilities, orchestration requires infinitely more manual time, and customer experiences are likely to be less relevant, consistent, and personalized.

Proof

When it comes to orchestration, the proof is in the form of demonstration. Ask the vendor to show how the campaign orchestrates engagement across the the buyer journey via:

- Display advertising
- Conversational marketing
- Content hubs
- Web personalization
- Sales engagement
- Direct mail
- Marketing email

Look for flexibility and comprehensiveness in the creation, launch, and management of campaigns.

Ask what’s driving the orchestration: rules or AI? Ask if journeys are behavior- or trigger-based. You should expect to see a complete demonstration of AI-driven journeys that span known and anonymous buyers.

Ask about AI-driven recommendations on the next best actions your revenue team should take to deepen engagement with target accounts. How are these delivered, and to which users?
Digital Advertising

*Why it matters*

Ad capabilities are a no-brainer when talking about account engagement.

Before we dive into what’s important about ads, it’s time to do some myth busting. ABM platforms have not reinvented the ad infrastructure or ecosystem that exists today, which means that every vendor uses the same real-time bidding infrastructure. And every ABM vendor has access to almost exactly the same ad inventory.

But that does not mean that every vendor solves display ads the same way. There are 5 ways to differentiate on display ads:

- Targeting quality
- Bidding strategies
- User experience for campaigns
- Integrated use cases
- "Pure play ad" vs flexibility

Digital ads perform best when targeted solely to the accounts you want to reach and to the most important personas within those accounts, which stems back to the previous sections in this guide. By that logic, all the pieces discussed above factor heavily into successful digital advertising; if your platform doesn’t accurately identify anonymous account behavior, match it to the correct account, and deliver deep insights about it, your account-based ads won’t deliver the strongest possible return on investment.

*Proof*

How does the vendor stack up on the 5 differentiators for ads?

At a minimum, digital ad capabilities should:

- Be 100% self-serve and fully integrated with the rest of the platform
- Support campaign creation and launch in minutes, with minimal lag times or delays
- Support campaigns that reach the largest number of accounts you need to target with a single campaign
- Support dynamic personalization, like personalizing ads based on the predicted buying stage, intent keywords or topics, personas, and account data
- Additionally, does the vendor support retargeting, and how accurate is the accuracy (hint: it ties back to account match rates)!? Does the vendor support all LinkedIn ad types? How many accounts can be targeted with these campaigns?
- How is brand safety and placement control managed? Do you, as a user, have the ability to manage ad blocklists and safe lists in the UI?
- How are external media campaigns managed? Can you use an outside DSP and aggregate metrics within the platform?
- And finally, what metrics are available on display campaigns? Can you track metrics in the platform like accounts engaged, account view-through rate, influenced pipeline by stage, and reach at both account and persona level? And do you have visibility into the domains your ads were served on?
## Tech Stack Integrations

**Why it matters**

No vendor has every channel native, and in some cases, you may have a preferred vendor whose capabilities meet your needs and integrate easily with your future platform.

The ability to use account-based data in other systems via API and integrations is key to maximizing your current tech stack investment.

**Proof**

Does the vendor have an open API? How many API calls are included?

What does the vendor’s partner ecosystem look like? Which systems in your tech stack does the partner have direct integrations with?
Collaborate with Sales

Account engagement is a team sport that requires sales and marketing to align on the best accounts to pursue — and when to pursue them. Comprehensive account engagement platforms provide meaningful data and insights that enable sales and marketing to work together to warm accounts, move them through the funnel, and conduct relevant sales outreach at exactly the right time.

With the right capabilities in your account engagement platform, your sales reps and BDRs can better prioritize accounts and contacts to work, personalize outreach based on what buyers care most about, get insights into the buying center and contact engagement levels, and time outreach based on where buyers are in the journey.
Buying Stage Predictions

Why it matters

Previous sections of this guide outlined three important AI-driven predictive models (ICP fit, contact fit, and contact engagement compared to your historical data), but there's one additional model that's critical to orchestrating account engagement: predicting the current buying stage for each account so sales and marketing know exactly when to engage.

Accurate buying stage predictions help align sales and marketing throughout the account engagement process. Marketing can run stage-based campaigns that warm target accounts and deliver relevant content that helps buyers proceed along the journey. Meanwhile, sales can prioritize outreach on accounts that are close to making a decision, which leads to better account engagement, more opportunities, and more revenue.

Combined with the other three predictive models, AI-driven buying stage predictions enable revenue teams to scale their account engagement strategies and deliver the strongest possible ROI.

Proof

As noted with the other models covered above, not every vendor offers AI-driven buying stage predictions, so first validate whether the platform includes these capabilities. Platforms that predict buying stages should continuously leverage both historical and real-time data. Ask if the predictive model uses historical data from your MAP and CRM, or if it uses broader industry trends to formulate predictions.

Ask for a demonstration of how sales and marketing users view and use these predictions. Can campaigns and outreach be orchestrated based on predicted buying stages?

Also be sure to ask how the vendor's data science team performs backtests to validate this model. Are backtests manual, or does the platform have automated backtest capabilities?

Lastly, ask about the recency of the data on which these models are based. Are predictions updated daily or weekly? More frequent is preferred.
Sales Insights

**Why it matters**

Aligning sales and marketing on the best accounts and contacts to pursue necessitates giving users from both teams easy access to relevant, continuously-updated data and insights that help them generate more pipeline and revenue.

Sales insights should be available in CRM in a visual, easy-to-understand format to drive adoption. The true measure of a vendor's sales experience is whether reps not only use it but rely on it for their day-to-day work.

With an intuitive sales experience that delivers real value to reps, your account engagement program will be dramatically easier to scale — and will be better positioned to deliver the revenue results you expect.

**Proof**

Include sales stakeholders in the vendor evaluation process. Request a demo of the sales experience and note how the platform shows reps:

- Intent activity, including topic or keyword research conducted by both known and anonymous prospects within the account.
- Marketing activity, including specifics like campaign name and recipients.
- Sales outreach activity, like email and phone call.
- Predicted buying stage and account fit, and the buying stage in which activities occurred.
- Buying center analytics, including which contacts are predicted to be most important and predicted engagement levels.
Next Best Actions

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<th>Why it matters</th>
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<td>Comprehensive account engagement platforms build on the insights delivered to reps by providing AI-driven recommendations for next best actions to take. Next best actions often include suggestions like new contacts to engage, missing contacts in the buying center to acquire, and key talking points to use in sales outreach.</td>
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With relevant AI-driven predictions at their fingertips, reps can better prioritize their time, book more meetings, create more opportunities, and ultimately, close more deals. |

As with other AI-driven capabilities, first validate whether the platform includes next-best-action capabilities. Ask about the data the platform leverages to formulate predictions and the frequency with which predictions are updated. Also, be sure to ask for a demonstration of the predictions in action. How do sales reps view predictions, and what integrations or other options are available for them to take action on predictions?
Sales Notifications

**Why it matters**

Delivering rich sales insights to reps in CRM is essential for a comprehensive platform, but it’s also important to proactively notify reps about account activity so they can take action.

Sales alerts should be available through multiple channels like Slack and email, and they should be configurable to deliver the right insights to the right people on the frequency they prefer, in order to help drive platform adoption and buy-in.

With strong sales insights and flexible notification capabilities, sales and marketing will be better aligned — and will collaborate more effectively to engage target accounts.

**Proof**

Sales alerts should be table stakes for a robust platform. Ask for samples, and find out which configuration options are available. Notifications should highlight:

- Account activity
- How engagement changed
- Personas engaged
- Keywords researched
- Pages visited

Ask how alerts are delivered (email, Slack, or other channels), the delivery frequency, and how recipients are managed.
Key Criteria

**Track Real Stuff**

Mirror, mirror, on the wall, which sales and marketing metrics tell me all? While metrics like MQLs, SQLs, and lead attribution used to be the fairest in the land, revenue teams today are increasingly focused on measuring the real business impact of account-based strategies and platforms.

Measuring the business impact of an account engagement platform requires metrics that show how effectively accounts are being engaged, which strategies and tactics are working, and the impact of the platform on pipeline and revenue. If sales and marketing don’t agree on the relevance or impact of a vendor’s metrics, generating organizational buy-in and scaling your account-based program can be challenging.
# Track and measure pipeline influence/created

## Why it matters
Growing pipeline and revenue are goals every salesperson and marketer can get behind, so it's important that your account engagement platform provide clear metrics that show the impact of campaigns and tactics. Without clear visibility into the business impact of the platform, generating buy-in and scaling your account-based program can be challenging.

A comprehensive platform should provide reliable metrics that show the pipeline and revenue impact — and tell a clear ROI story.

## Proof
Ask for a demonstration of how users can track influenced pipeline and revenue. Are the dashboards or reports understandable, and can users across the revenue team access and use them?

Ask about AI-driven recommendations for improving underperforming campaigns.
**Campaign Metrics**

**Why it matters**

At a bare minimum, an account engagement platform should manage budgets for display campaigns, but it’s important to be able to drill into how budgets are spent and the impact delivered. A comprehensive platform should include up-to-date metrics like the number of accounts engaged, accounts newly engaged, and both click- and view-through rates. It’s also critical to understand which accounts and personas were reached by a campaign, the number of impressions and clicks for each, the domains on which ads were served, and what personas were targeted and reached.

With comprehensive account-based metrics for display campaigns, your digital team can optimize budget spend and validate the impact of campaigns on the organization’s account engagement strategy.

**Proof**

Ask for a demonstration of all display metrics provided within the platform as well as an explanation of what each metric means — and how teams should interpret and adjust campaigns based on results.

Ask for customer references that can speak to their experience managing spend and optimizing campaigns based on the platform’s display metrics. And since media spend is closely related to the platform’s account match rate, ask whether campaigns are consistently reaching target audiences.

Finally, inquire about display advertising costs and minimums, including the average CPM, minimum campaign spend requirements, and any required (or optional) service fees.
Engagement Metrics

**Why it matters**

Prioritizing accounts showing buying intent is critical to your business success. Many platforms can show engagement at the account level, but the focus should be on engagement as a performance metric to understand business impact.

Having deep insights on engagement from both the buyer side and your team enables the organization to make informed decisions on how to strategically target accounts, plan campaigns, and structure outreach activity.

A comprehensive platform should give you insight into buyer engagement as well as engagement performance by your sales and marketing teams.

**Proof**

A score should be assigned to all aspects of intent, engagement, and reach so that your teams can prioritize the most engaged accounts.

For example, if an account is showing high intent but outreach is low, there is potential to lose that deal.

Ask how your team can assess the performance of engagement data to reach the best-fit accounts.
Value and Model Metrics

**Why it matters**

An account engagement platform (and your account-based program) can only scale and succeed if users across sales and marketing buy into it and use the technology to improve revenue results. Without understanding usage of the platform, the value derived from the platform, and the performance of models in a visual format, deducing the ROI can be difficult.

Value typically translates to dollars, and a comprehensive platform should fill your pipeline with opportunities ready for engagement. A platform should also show you the results of your account engagement strategy and how your efforts have paid off in terms of revenue. With performance metrics available across the revenue team, you can decide if changes are needed or if you are just hitting your stride.

For those platforms that have predictive capabilities, you should be able to assess how it has contributed to the number of new open opportunities.

**Proof**

Ask for a demonstration of reports that show how the platform is being adopted and used across the organization. Do the reports give you insight into contractual limits you may be approaching? Can you leverage the reports to guide internal enablement and training efforts as you scale your account-based program?

Ask for a demonstration of reports that assess the performance of the platform’s predictive models. Do the reports provide an assessment of how ICP fit and buying stage predictions impact opportunity conversion rates and revenue? Do the reports assess how contact fit and behavior predictions impact opportunity conversion rates and revenue?
About 6sense

The 6sense Account Based Orchestration Platform helps revenue teams identify and close more opportunities by putting the power of AI, big data, and machine learning behind every member of the B2B revenue team, empowering them to uncover anonymous buying behavior, prioritize fragmented data to focus on accounts in market, and engage resistant buying teams with personalized, multi-channel, multitouch campaigns. 6sense helps revenue teams know everything they need to know about their buyers so they can easily do anything they need to do to generate more opportunities, increase deal size, get into opportunities sooner, and compete and win more often.