



# S.M.A.R.T ACCOUNT BASED MARKETING

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20 orchestrated plays designed to engage with target accounts at every stage of the buying cycle.

- S** Sales and
- M** Marketing
- A** Accelerating
- R** Revenue
- T** Together



# In the marketing world, we suffered from two not-so-great approaches: the hand-off and the omnichannel fumble.

In the ever-evolving landscape of B2B sales, Account Based Marketing (ABM) stands as a revolutionary approach that redefines how companies engage with their most valuable prospects. Unlike traditional marketing methods that cast a wide net, ABM empowers teams to precisely identify and target buying committees within specific organizations (EG: people who are accountable, responsible, consulted, or informed about key purchases).

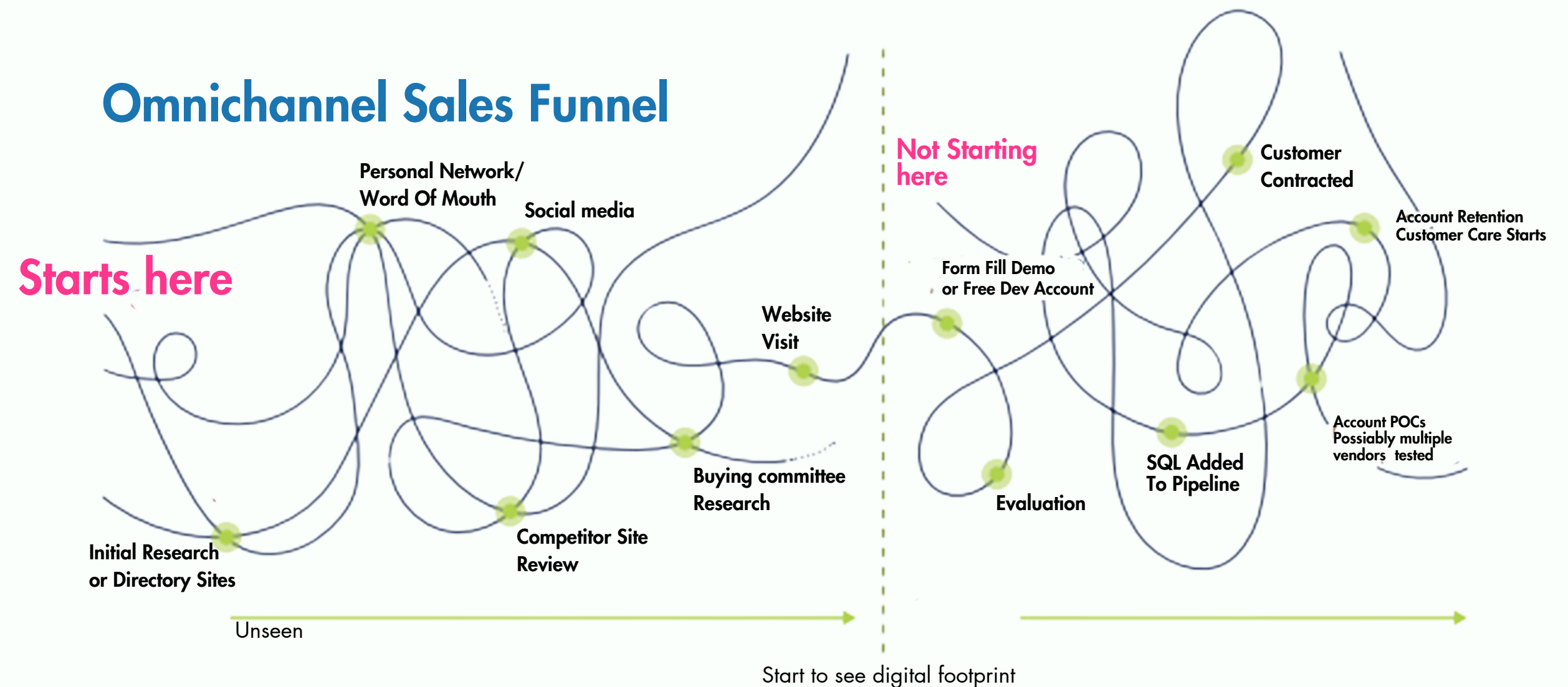
By surrounding each decision-maker with highly personalized messaging, ABM seeks to accelerate the sales cycle and deepen relationships, driving higher conversion rates and long-term business retention and growth.

- B2B buyers are typically 57 percent of the way to a buying decision before actively engaging with sales.
- 70 percent of buyers fully define their needs on their own before engaging with a sales representative, and 44 percent identify specific solutions before reaching out to a seller.
- 67 percent of the buyer's journey is now done digitally.

## Traditional Sales Funnel



## Omnichannel Sales Funnel



# The Account Journey Isn't linear

A key principle of S.M.A.R.T ABM is aligning every aspect of our go-to-market to the right account experience for every stage of its journey. So what does the account journey even mean?

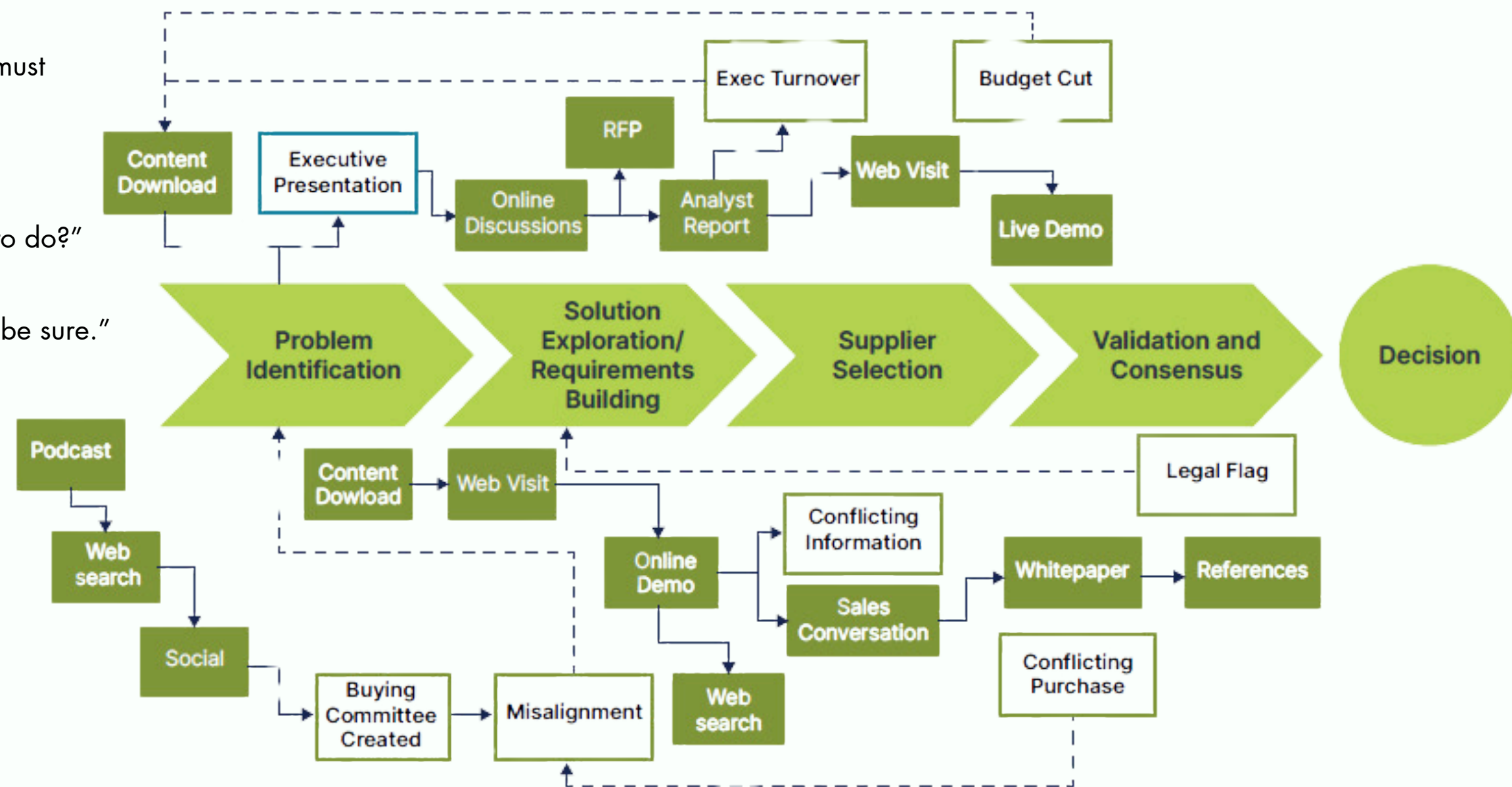
## The account journey twists & turns.

Gartner's research identified six B2B buying "jobs" that customers must complete to their satisfaction to finalize a purchase:

- **Problem identification.** "We need to do something."
- **Solution exploration.** "What's out there to solve our problem?"
- **Requirements building.** "What exactly do we need the purchase to do?"
- **Supplier selection.** "Does this do what we want it to do?"
- **Validation.** "We think we know the right answer, but we need to be sure."
- **Consensus creation.** "We need to get everyone on board."

But these jobs aren't completed in a linear fashion. Buyers engage in "looping," revisiting each of those six buying jobs several times over the course of a purchase process.

S.M.A.R.T ABM marketing and sales teams operate more like a football team, working together to move the ball down the field. The path is rarely straight, but it's always directed.



# Deploying Account Based Marketing seeks to unite sales & marketing teams using omni-channel campaigns across the buyer journey.

A revolutionary approach to selling, ABM allows teams to identify B2B buying committees at companies and surround each buyer with personalized messaging. This “buying committee” is typically comprised of people who recommend, those that evaluate or influence a final buying decision, and those who ultimately push for specific functionality or pricing.

## S.M.A.R.T ABM DEFINED

**Buyer's Journey:**  
Touches all aspects of the full customer journey including brand, pipeline, opportunities, and postsale retention/expansion.

**Marketing and Sales:**  
An orchestrated process across marketing and sales (plus sales development, customer success, and any other customer-facing team).

S.M.A.R.T ABM is a **B2B growth strategy** that injects **Account Intelligence** into every step of the **buyer's journey**, across every **marketing & sales** motion

**B2B growth strategy:**  
A fundamental strategy that spans all your go-to-market efforts; not a simple campaign or tactic.

**Account Intelligence:**  
Uses research and AI to know when and how to engage, and what to say.

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# 7 Essential Steps in the ABM Process



Qualified

Aware

Engaged

Marketing  
Qualified Account

Sales Qualified  
Opportunity

Customer

Post Sales  
Upsell / Referrals

Early in the journey, we focus on building your company brand on a foundation of trust leveraging content, affiliations and PR.

We then move from emotion to logic with thought leadership and education found both on our site and on other domain authorities.

We seek to find out when accounts are in-market and are interested in hearing from us— but before they raise their hand on our website.

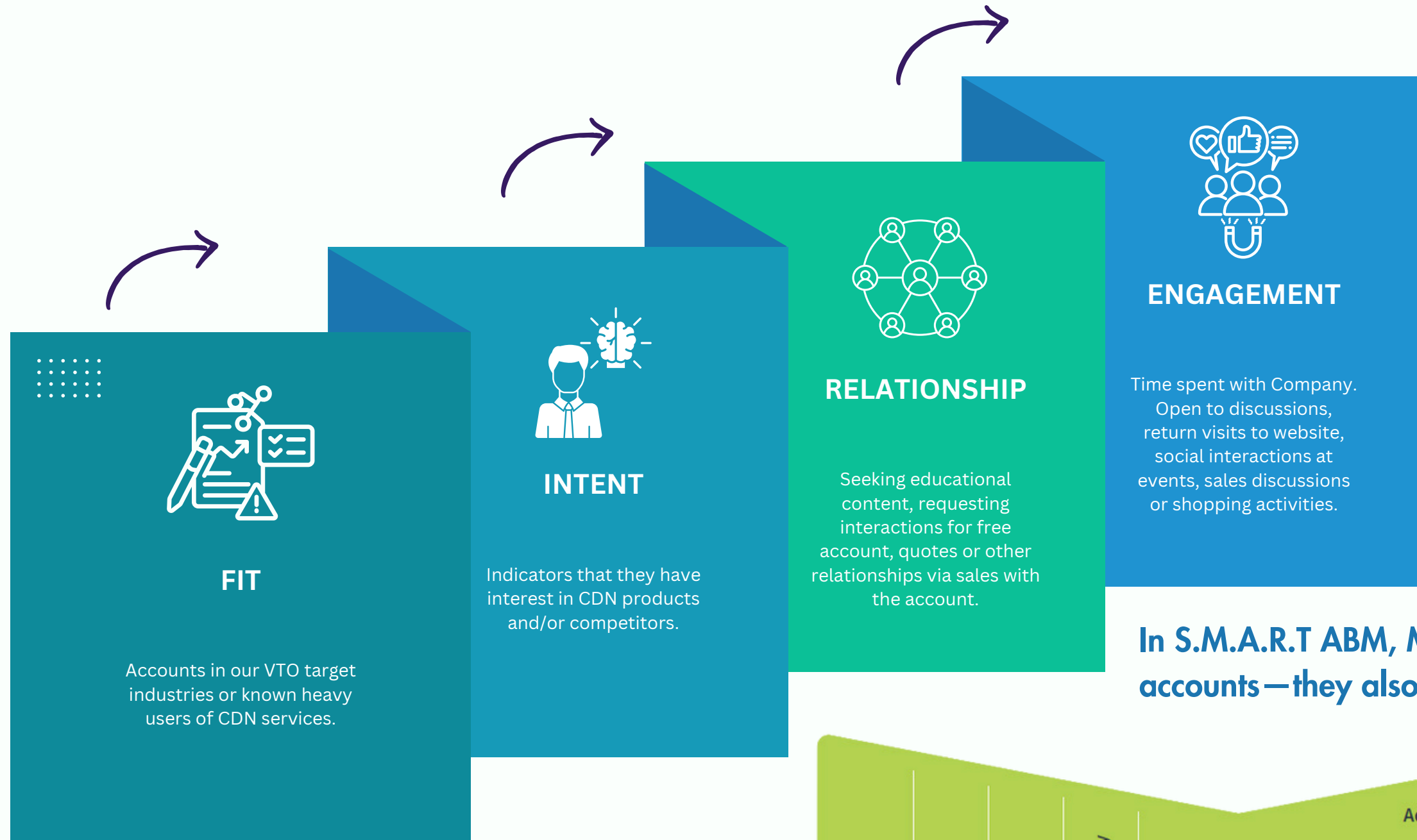
We strive to break down the traditional “baton pass” from marketing to sales, connecting insight to action and engaging the entire buying committee upfront to effectively understand and respond to questions.

Enhance the post-sale experience by continuing to identify key opportunities to recommend and engage at the right time.



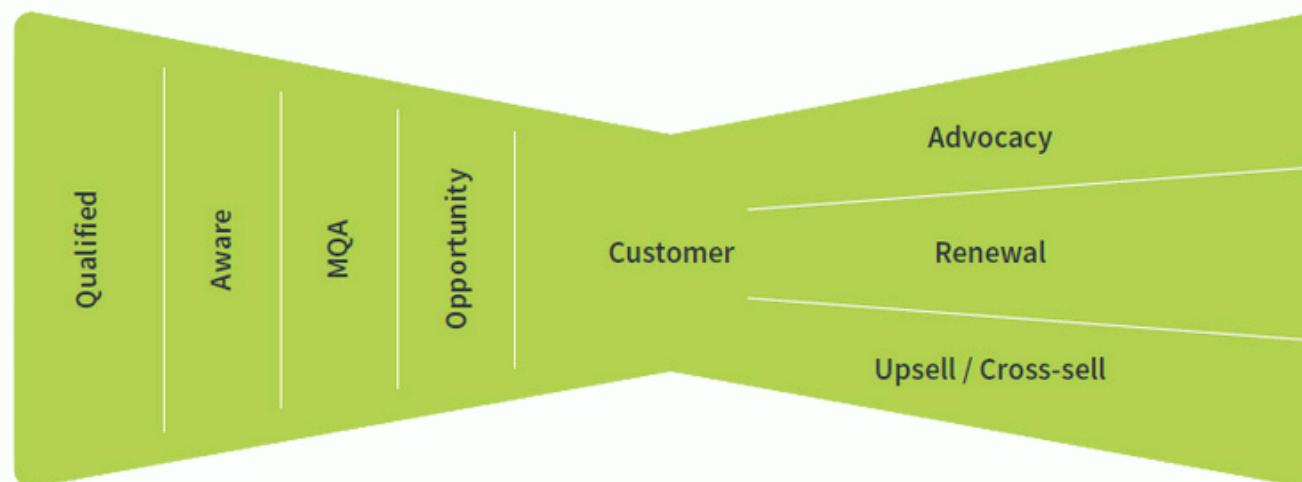
# Identifying Marketing Qualified Accounts (MQAs)

Framework for non-linear buying process - Identify if the account is on FIRE for an ABM activation



By mapping the non-linear account journey to a linear set of buying stages, we can achieve similar benefits, helping us measure our progress and guiding our marketing and sales plays. The key insight is that an account will move forwards AND backwards through the stages—throughout their nonlinear process—and your go-to-market must adapt accordingly.

**In S.M.A.R.T ABM, Marketing and Sales don't just land new accounts—they also expand them together over time.**



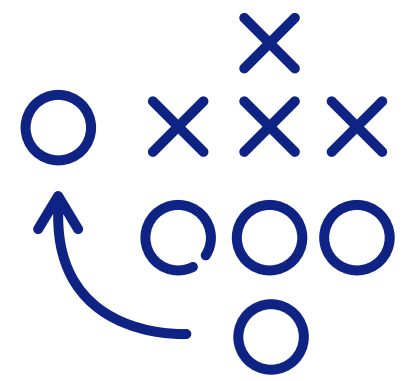
This means your account journey should look beyond the closed-won opportunity. It's a richer view of the relationship: While new business typically has only one goal for the journey (acquire the account), many goals emerge after the sale, like these:

- Cross-sell
- Upsell / expansion
- Renewal
- Usage
- Success
- Advocacy

# Executive Summary

## 20 ORCHESTRATED PLAYS

In the following examples, we group orchestration plays by the point in the buying cycle they'd be used. Also, keep in mind that multiple plays can be used in any one stage of the buying cycle, depending on how the deal progresses. We can also link plays together for increasing sophistication.



### If This

### Then That

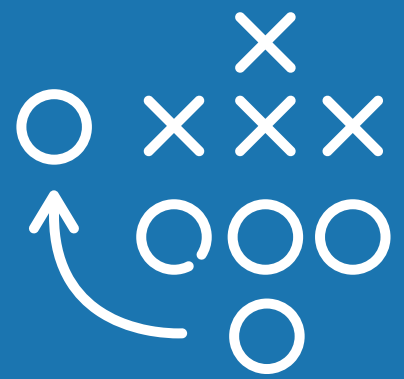
<ul style="list-style-type: none"> <li>Target ABM accounts that are not yet engaging with your website and campaigns</li> </ul>	Advertise to build awareness and attract them to your website
<ul style="list-style-type: none"> <li>Target account that's aware but not in-market</li> </ul>	Send a personalized or fun gift to build brand affinity
<ul style="list-style-type: none"> <li>Key executive from a top target downloads content or registers for a webinar / conference</li> </ul>	Offer a meeting with your company's subject matter experts or prompt the salesperson to reach out for a personalized demo
<ul style="list-style-type: none"> <li>Qualified accounts that are a good fit for personal invites to an upcoming roadshow</li> </ul>	Orchestrate direct mail and human outreach
<ul style="list-style-type: none"> <li>New marketing qualified account (qualified and in-market)</li> </ul>	Reach out to multiple personas at the account
<ul style="list-style-type: none"> <li>Valuable accounts that aren't responding over other channels</li> </ul>	Use hyper-personalized, high-value offers to engage with top decision-makers EG: Add image optimization or white glove service at no cost if it helps secure high value enterprise
<ul style="list-style-type: none"> <li>Lower-level contact from key account attends an online demo</li> </ul>	Lift the conversation by inviting a C-level exec to meet with one of your top executives
<ul style="list-style-type: none"> <li>Open opportunity</li> </ul>	Help the full buying committee drive validation and consensus with broader advertising and executive alignment
<ul style="list-style-type: none"> <li>Stuck or lost opportunities that show intent or engagement from key personas, but don't have any recent sales touch</li> </ul>	Alert the account executive to take action and/or bring in new voices and channels to get the conversation going again
<ul style="list-style-type: none"> <li>Existing customers that start showing intent or engagement in products they don't yet own</li> </ul>	Reach out to the new buying center using your team and your existing contacts at the customer
<ul style="list-style-type: none"> <li>Customer showing intent for competitor keywords</li> </ul>	Alert the CSM and account manager, set up executive alignment meeting

# Intent and Engagement Plays

## 1. The Interception [Ad to Email Nurturing]

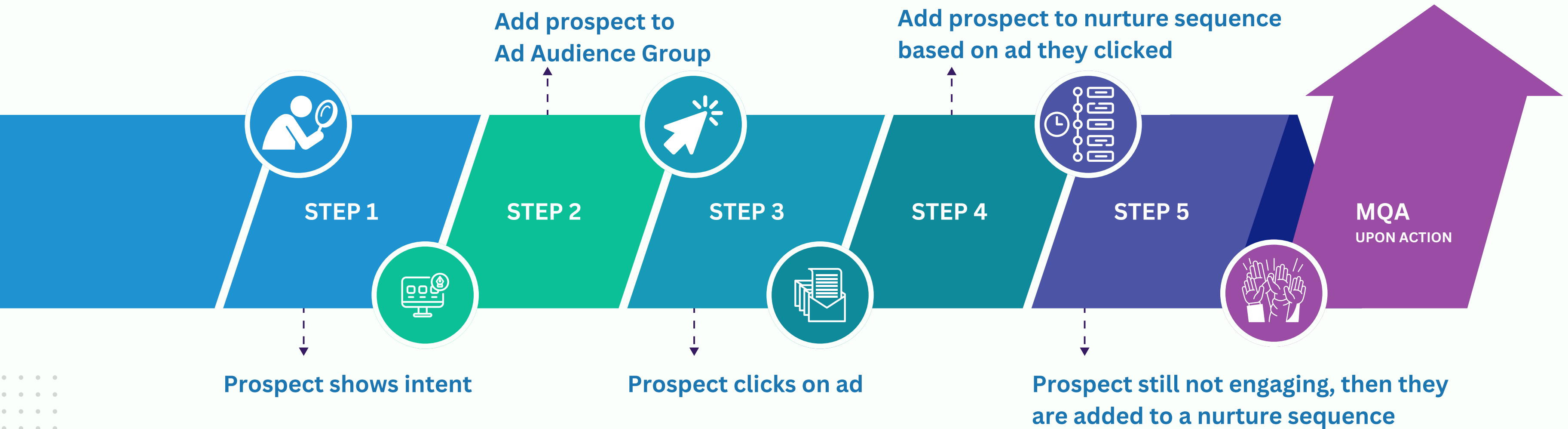
This play is for people actively searching for your company's solution that we don't know about. We use advertising to build awareness and attract them to our website or a specialized landing page.

By leveraging intent data and combining it with a multi-channel orchestrated play, we aim to drive engagement and influence how and when they buy.



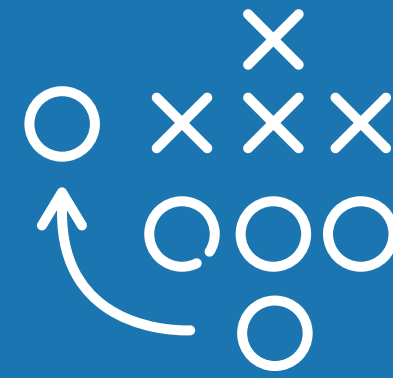
**Send personalized site experiences.**  
Identify qualified accounts that are not yet engaging with your company and use advertising to build awareness and attract them to our website.

Then, customize the website to personalize the experience — custom content hubs for 1:1 accounts or customized by industry and/or journey stage for others.





# Intent and Engagement Plays



## Send a personalized email of introduction.

When a new rep enters a territory or sector for the first time, they can send an email identifying themselves as the new point of contact and offering to schedule an introductory call.

## 2. The Long Pass [SDR Multi-Touch]

This is a play focused on sales development rep (SDR) motions that nurture high-value accounts. It incorporates multiple channels, including voicemail, email, video, one-to-one outreach, and more.

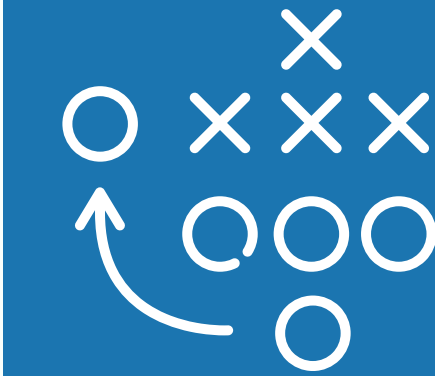
Here are the actions that an SDR can take, step by step:

<b>Step 1</b>	<b>Step 3</b>	<b>Step 5</b>	<b>Step 6</b>	<b>Step 8</b>	<b>Step 11</b>	<b>Step 11</b>
Intro email + voicemail	Follow up on email with high-level value proposition (broad scope to ensure applicability)	1:1 personalized video (channel of your choice)	Email follow up on voicemail	Email calling out specific product fit	Call or voicemail	Email follow up on voicemail, call out why you offer value to their role
<b>Step 14</b>	<b>Step 16</b>	<b>Step 20</b>	<b>Step 24</b>	<b>Step 27</b>	<b>Step 31</b>	<b>Step 31</b>
LinkedIn connection request	Voicemail	Short video demo of solution most applicable to their role/priorities	LinkedIn message	Email citing relevant partnerships/solutions	Voicemail	Email follow up on voicemail citing Twitter bio or other social media tidbits
<b>Step 35</b>	<b>Step 35</b>	<b>Step 38</b>	<b>Step 40</b>			
Voicemail	Email follow up on voicemail with current product updates	LinkedIn follow-up note. Call + voicemail	Call + voicemail. Move prospect to nurture			

# Intent and Engagement Plays

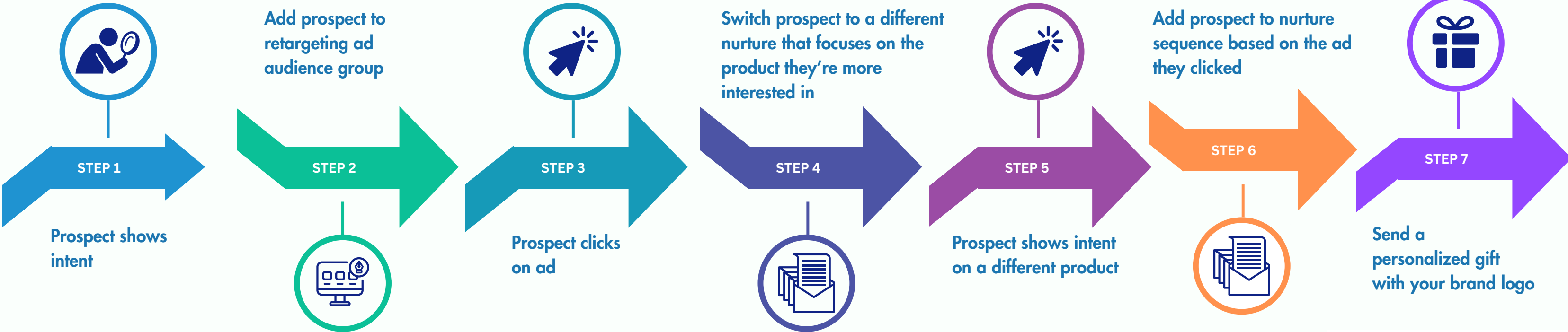
## 3. The Gift Run [Retargeting & Personal Touch]

This play is for high-value prospects who are aware of your company's solution but haven't shown a level of engagement sufficient to merit our sales development team to start reaching out.



Send gifts to engage new accounts in a fun, friendly way.

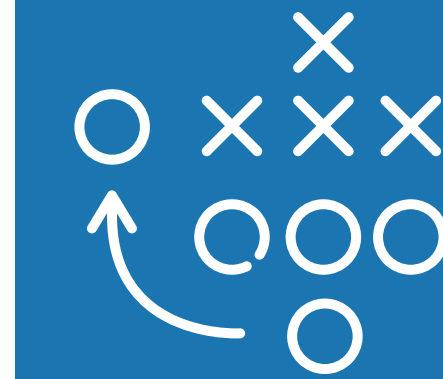
Accounts may appreciate a personalized or fun gift (e.g., a donut/bagel breakfast, a cupcake celebration, or something related to pop culture), and perhaps we can throw in a valuable piece of thought leadership content as well.



# Intent and Engagement Plays

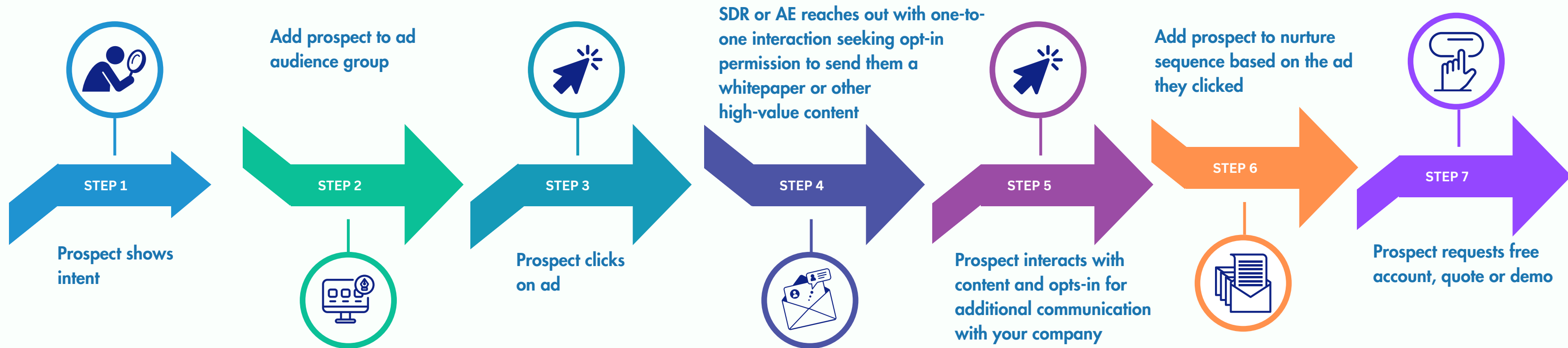
## 4. The Grab [Getting Opt-In Permission]

This play leverages lead magnets, quizzes, webinars, and other ways to gain opt-in permission to add prospects to newsletters. We would use this play to gain opt-in permission to create continual communication and educational warming of prospects.



### Lead Magnets & CTA Forms.

In S.M.A.R.T ABM, we often build out our database with contacts for target personas. But those key people may not have given us permission to send marketing emails. So we can't send them nurture emails and newsletters to nurture their engagement in a scalable way.



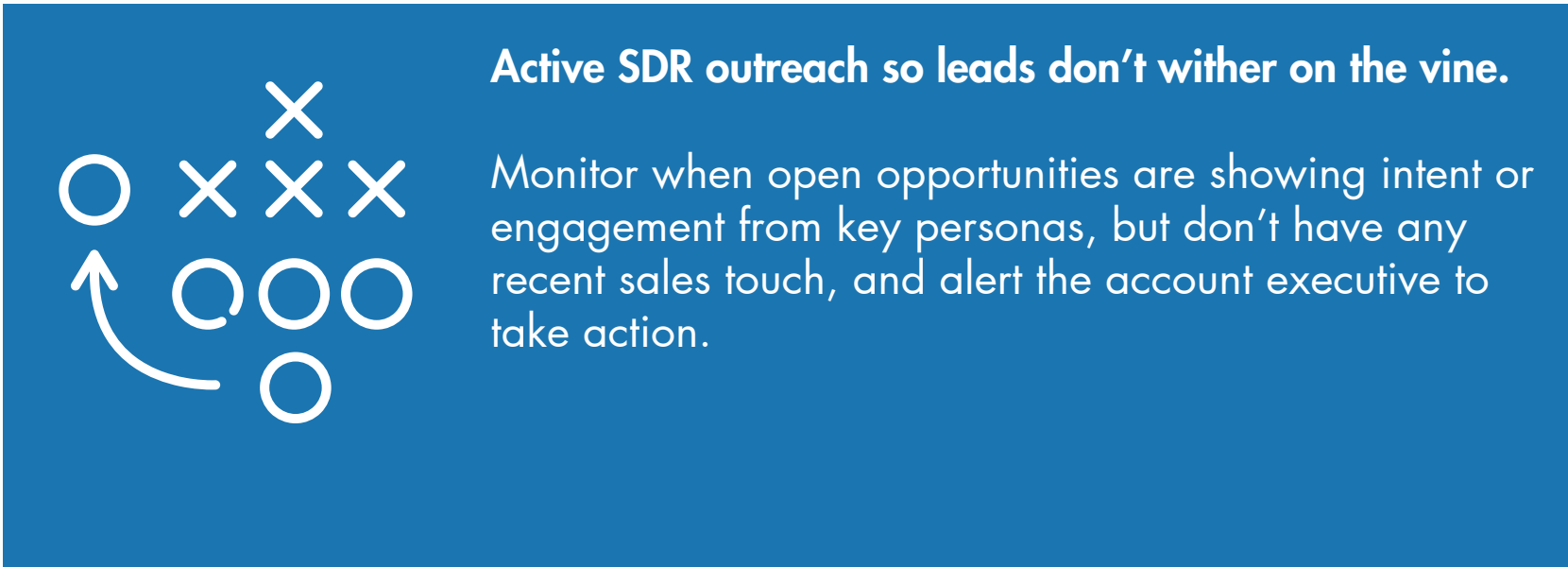


# Intent and Engagement Plays

## 5. The Reach [Getting into the Account]

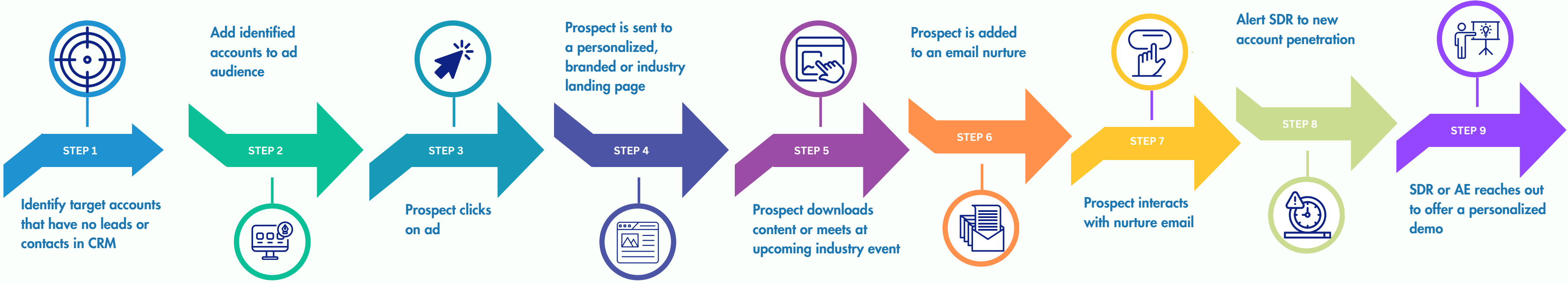
This play is for a list of target accounts where we don't know the people in every single account.

For the accounts without contacts, we can target everyone in the company with ads and then wait until someone self-identifies. Suddenly, with them taking action, we gain access to an account we didn't have before.

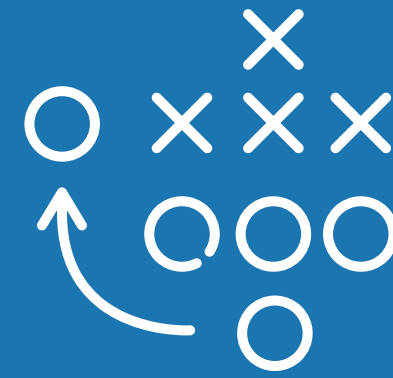


**Active SDR outreach so leads don't wither on the vine.**

Monitor when open opportunities are showing intent or engagement from key personas, but don't have any recent sales touch, and alert the account executive to take action.



# Intent and Engagement Plays



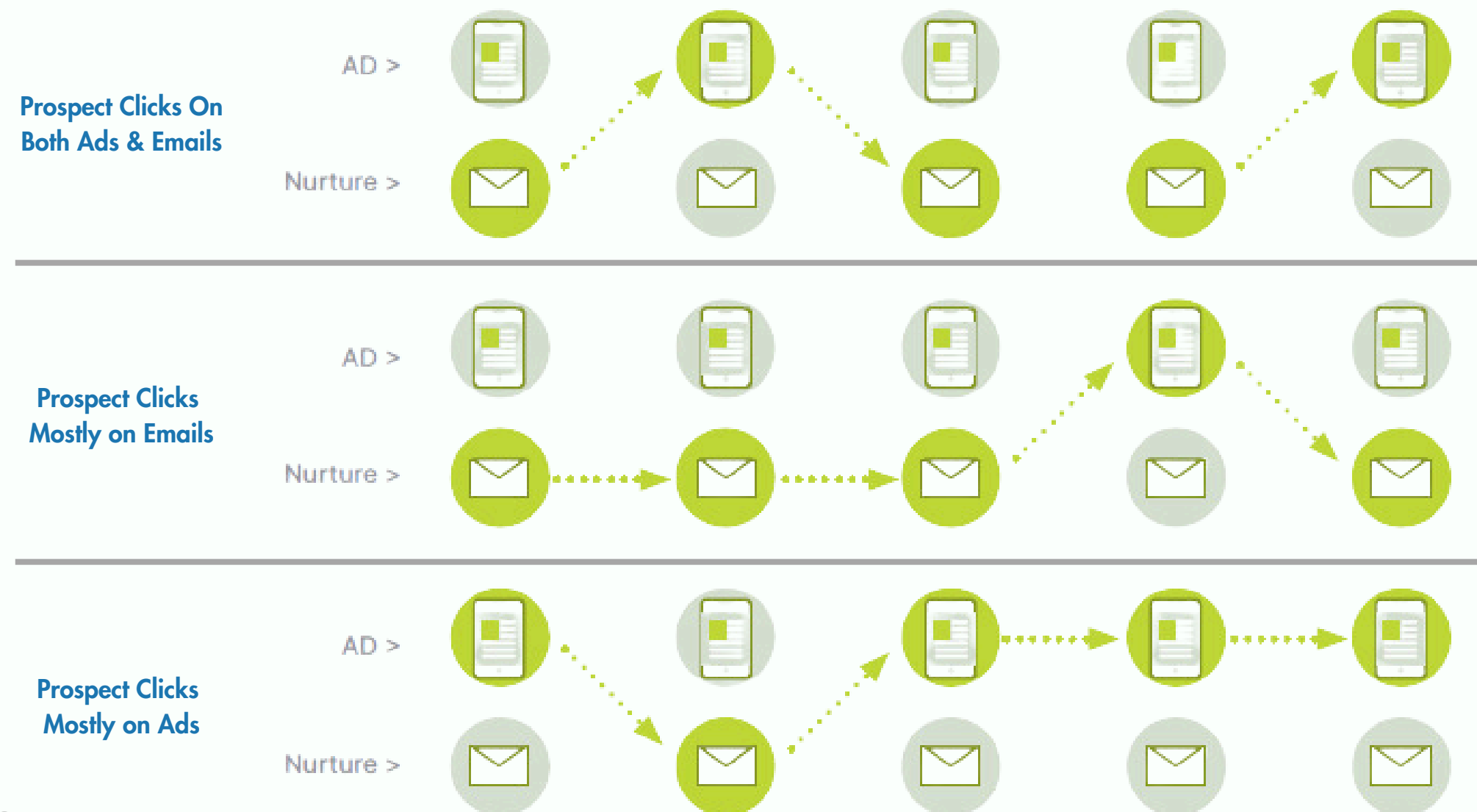
**Example A:** Say our contact clicks on our first nurture email containing content A, and they don't interact with anything else. Then, next week, we can send them a nurture email with content B, and so on for five weeks.

**Example B:** Our prospect opens our first nurture email (with content A). Then, they click on an ad that shows them content B. Because they already consumed content B, the next email they receive in their nurture stream will contain content C. If they consume content C, the next ad they'll be shown will contain content D. But if they don't click on the ad with content D, then the next email they receive will also be about content D, to ensure they consume it.

## 6. The Nurture [Taking it an Extra Step with if-then Scenarios]

With orchestrations, we can make sure your contact experiences the same flow of information, regardless of what platform they're engaging with your company.

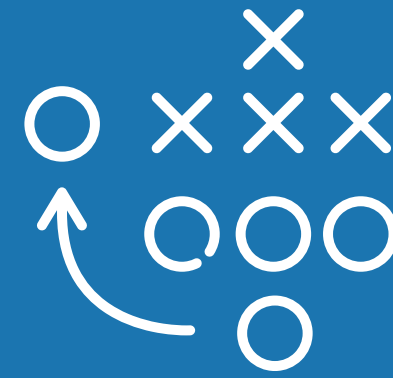
For example, if we have five emails in our nurture stream (A, B, C, D, and E), We can also put that content into an ad.



# Marketing Qualified Plays

## 7. The Scrub [Maintaining Data Hygiene & Consistency]

This play focuses on getting the audiences and data right when a prospect becomes marketing qualified.



Following all the steps in this play we would maximize our ad ROI because we won't be targeting people who are already speaking to sales reps.

Plus, it will keep our data clean by making sure we always update the CRM, and it will keep the prospect's experience consistent as they shift from marketing to sales interactions.



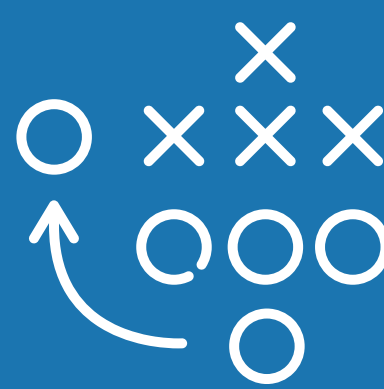


# Marketing Qualified Plays

## 8. The Toss [SDR Hand-Off]

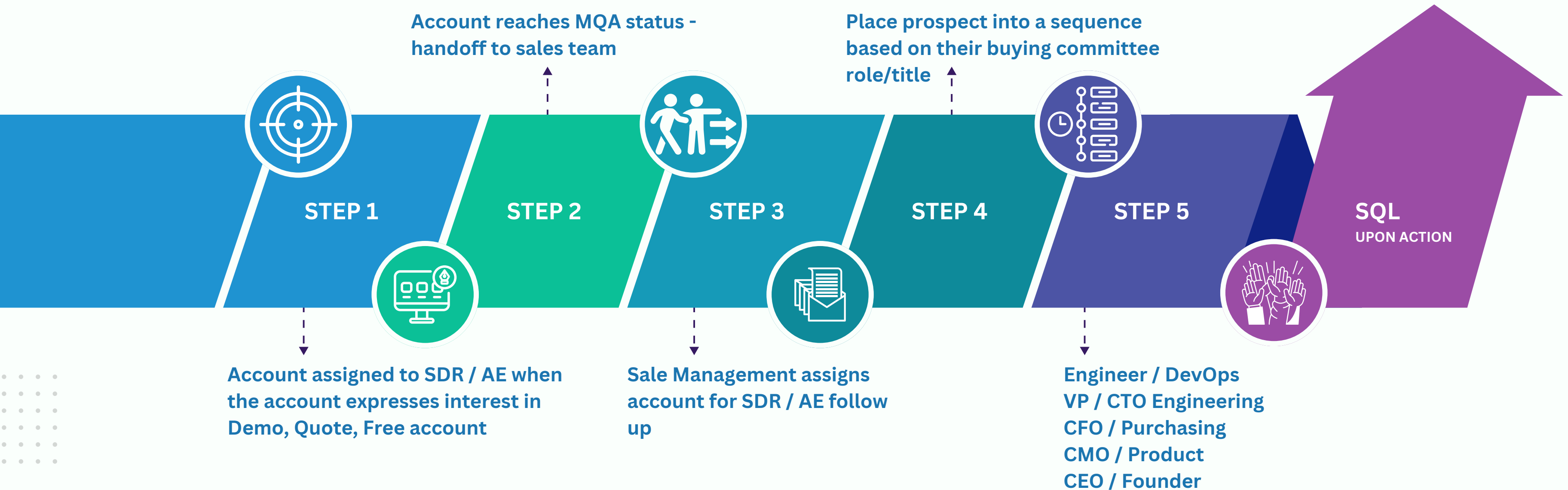
If we become concerned that our SDRs or AEs aren't following up on the leads that marketing creates, assigning tasks based on MQA comes in.

It's a good idea to have a few different sequences that are customized based on the title so that a CTO isn't getting the same information as an engineering ops person receives.



**Use hyper-personalization to connect with valuable accounts that aren't responding over other channels.**

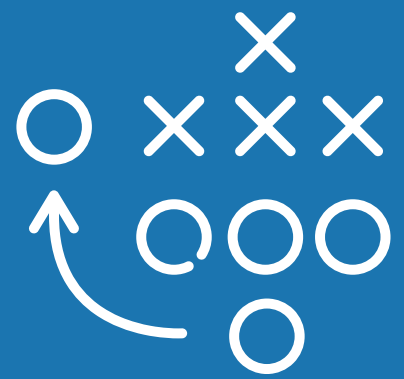
If a valuable MQA goes quiet and isn't responding to SDR outreach, we will try something different: a message from another person at your company, a personalized celebrity message using a Cameo, or a high-end gift to the top decision-maker.



# Marketing Qualified Plays

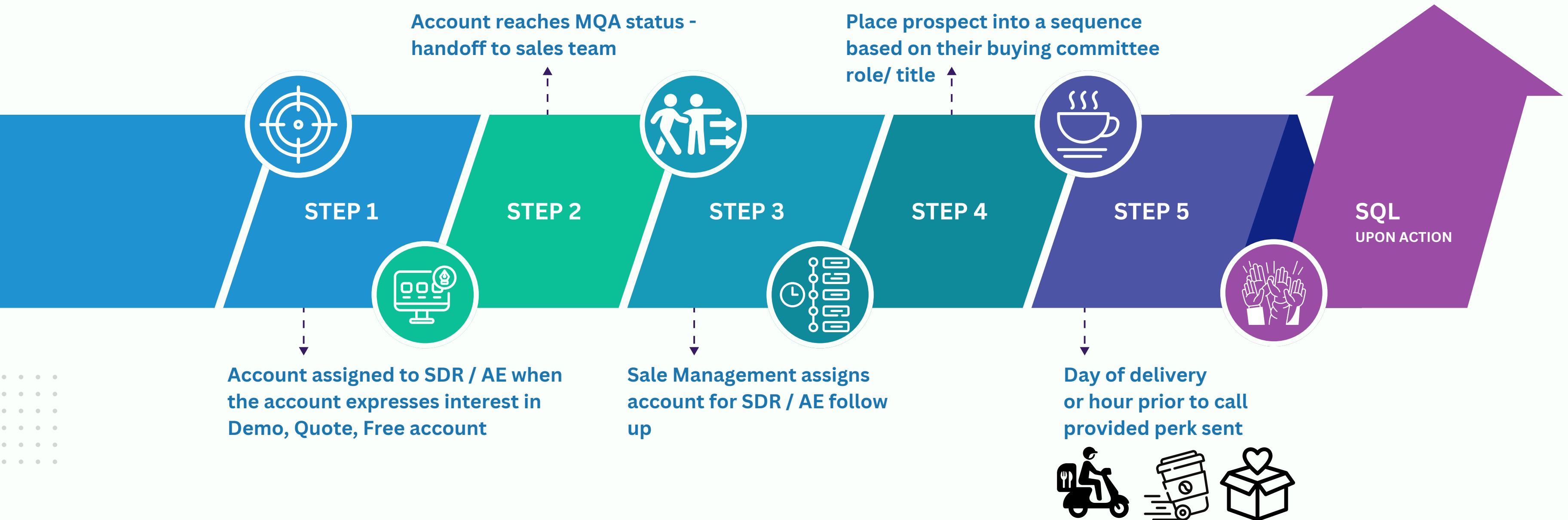
## 9. The Perk [Nurture with a Freebie]

With this play, we'd be sending a gift before the contact takes a meeting. There are a million different e-gift and direct mail strategies out there. With this one, we'd send a direct mail package once a prospect is MQA, but before they've taken a meeting. It's a show of goodwill to the prospect, as you're willing to give them value before they give you value.



**Increase sales meeting attendance with gifts.**

We've all experienced the challenge of our key prospects forgetting or simply not attending sales meetings. Sending a gift like a coffee or meal card, one hour before the meeting can increase the chances they'll show up.

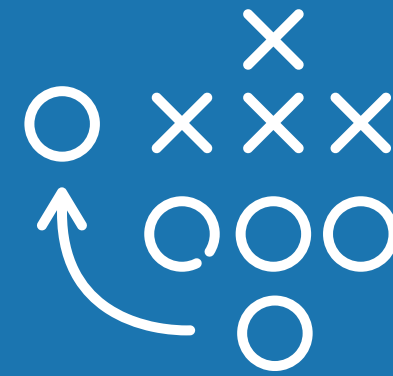


# Marketing Qualified Plays

## 10. The No Wasted Spend [Boost SQLs]

Do we need more contacts in high-priority accounts? With this play, we focus on acquiring new contacts in accounts that are in the sales-qualified stage.

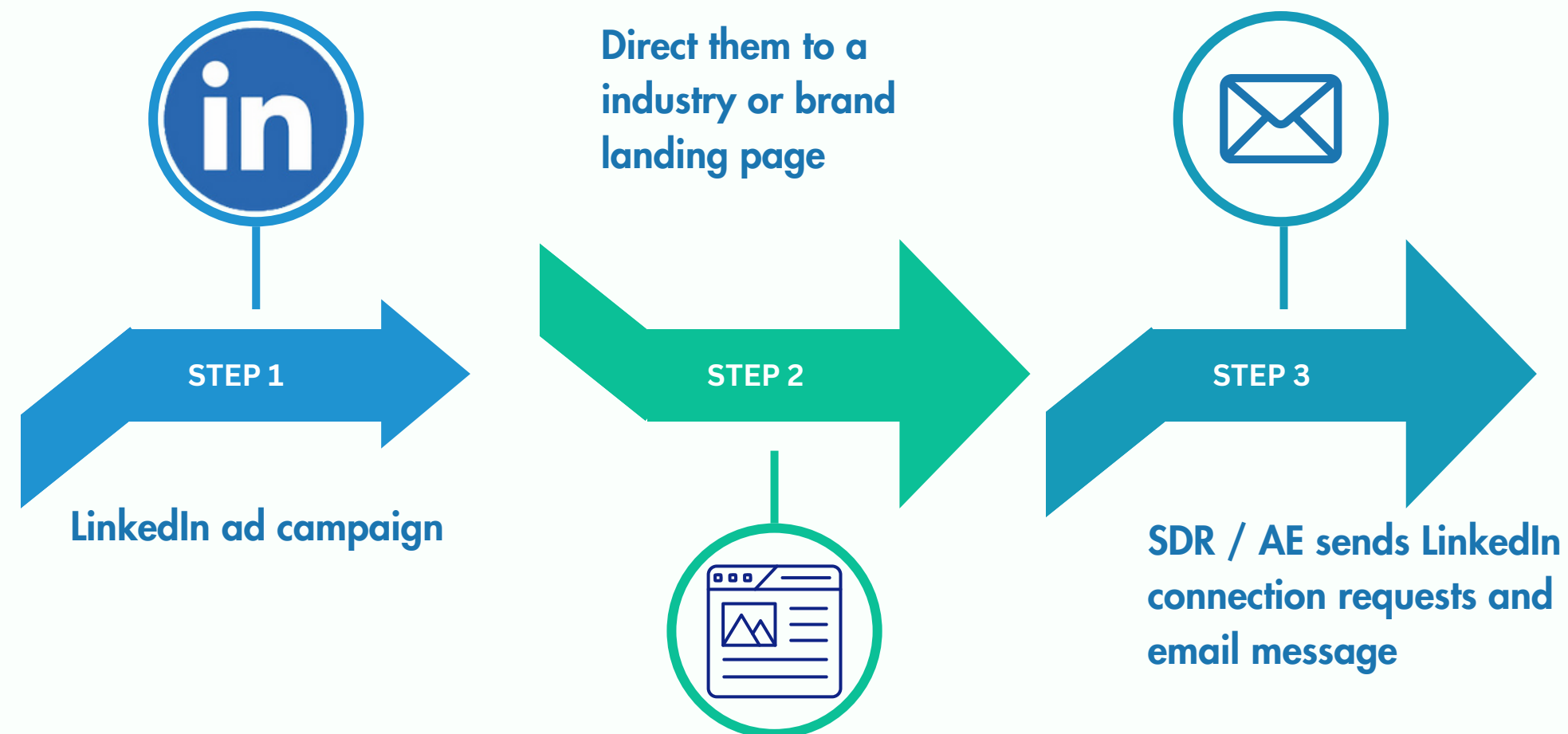
For the audience in our LinkedIn ad campaign, we would include all of our accounts but would suppress the known contacts that are already on a separate audience list.



**Up-level your conversations by connecting to the decision makers.**

The people who fill out an online form or we meet at tradeshows are often influencers, recommenders, and researchers, not true decision-makers. Instead of treating them as hot leads to jump on, use them as account-level interest signals.

For example, if a lower-level contact from a key account attends an online demo, try also inviting a C-level exec to meet with one of your company's top executives.





# Hail Mary Plays

These are for when you've had a prospect talk to sales, but then they've gone dark for some reason.



**When an opportunity goes dark, change things up.**

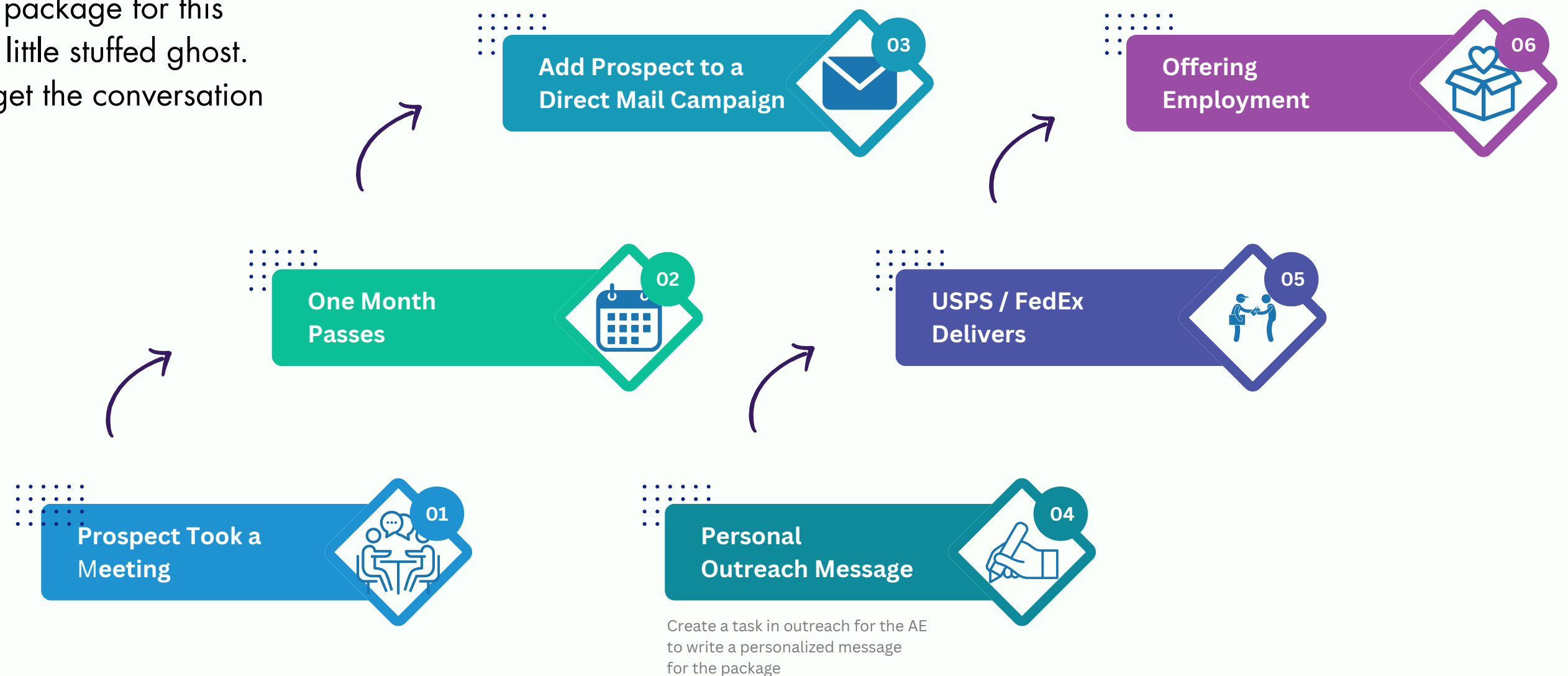
If the buyer stops responding to the account executive, we can try bringing in new voices and channels to get the conversation going again.

## 11. Hail Mary: Cuz we got ghosted

The prospect took a meeting, but then they went dark.

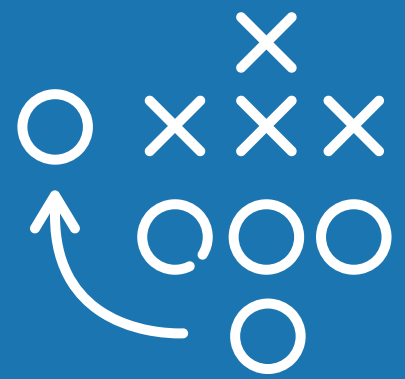
If they're not responding to traditional outreach, direct mail is a great tool for getting their attention.

If a prospect ghosts our AE... then it's time for a bit of stalking. (But not real stalking. Only classy business stalking.) For example, send a "Why'd You Ghost Us?" package for this scenario, where we send prospects a cute little stuffed ghost. Doing something like that is a fun way to get the conversation going again.



# Hail Mary Plays

These are for when you've had a prospect talk to sales, but then they've gone dark for some reason.



**When an opportunity goes dark, nurture again.**

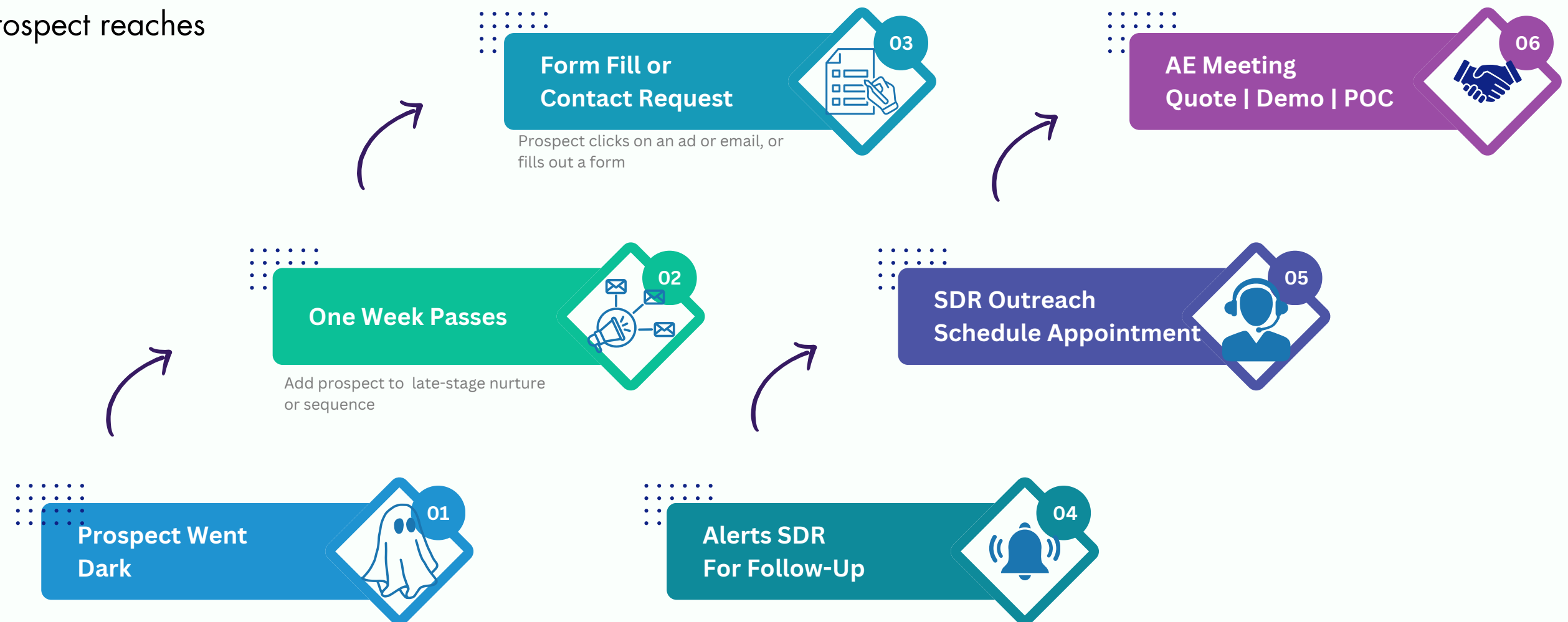
If the buyer shows intent but still does not engage with an AE or SDR, we can send a late-stage buyer sequence of emails prompting urgency and highlighting additional feature and value proposition.

## 12. Hail Mary: The "Guess who I ran into?"

When the prospect comes around again, we make our move!

When we see an account with lost opportunities showing intent, either by surging on intent data or interacting with our brand in some other way, it may be a great time to pick up the conversation again and alert the SDR to follow up.

This play can work either before or after a prospect reaches MQA status a second time.



# Hail Mary Plays

These are for when you've had a prospect talk to sales, but then they've gone dark for some reason.



**When an opportunity goes dark, prompt them again with ads.**

If the buyer stops responding to the account executive, try bombing them with new creative online. Grab their attention with targeted messaging just like when you abandon a retail cart.

## 13. Hail Mary: The Ad Campaign Flex

The account walks away, but we need to capture their attention.

You know those emails you get from stores that tell you when you've left something in your cart? "Yes, Drazen, I know you don't need that \$200 Boss polo shirt, but it's still here waiting for you. And it would look so good on you ..."

This is the ad equivalent of that email. If we have ads already designed for common Hail Mary scenarios, then it's easy enough to add people to the audience for them.



# After the Sale

## 14. The Screen [Ads for Upsells]

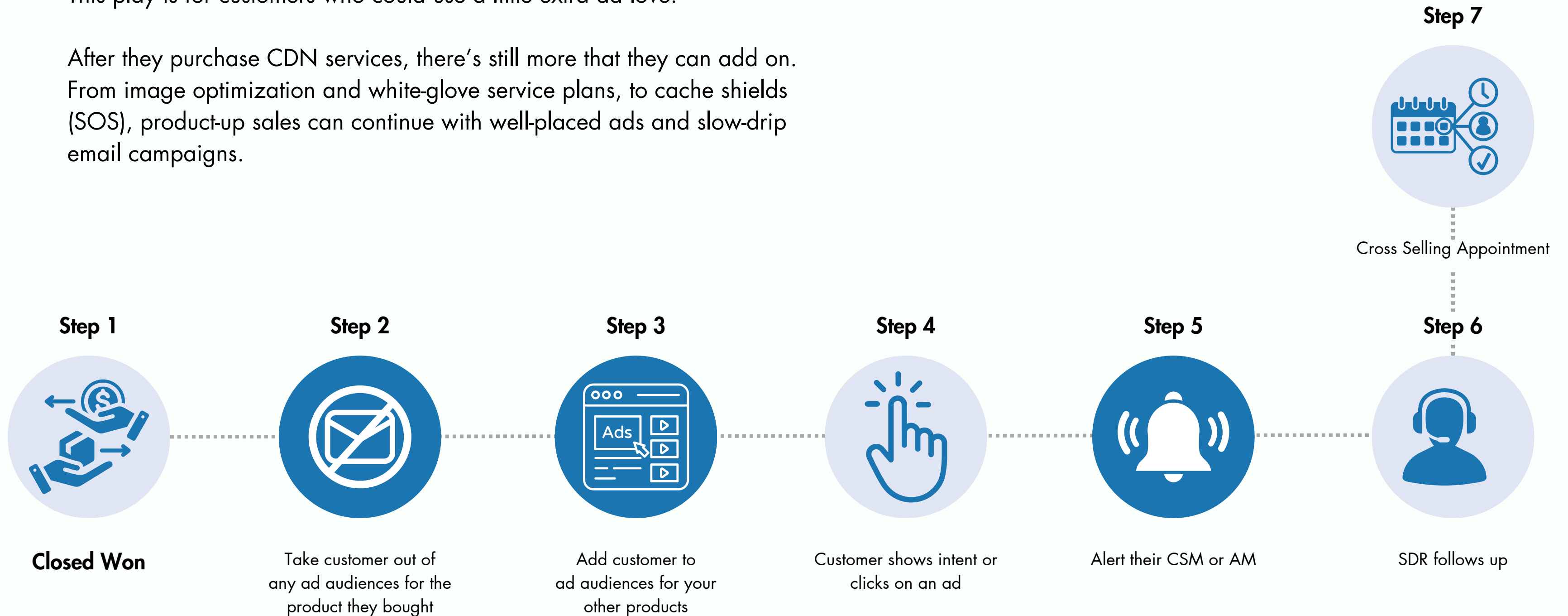
This play is for customers who could use a little extra ad love.

After they purchase CDN services, there's still more that they can add on. From image optimization and white-glove service plans, to cache shields (SOS), product-up sales can continue with well-placed ads and slow-drip email campaigns.



**Advertising add-on products & services.**

Expanding existing account revenue is a key component of S.M.A.R.T ABM. We would continue to monitor for intent and engagement by product line and identify existing customers that start showing interest in products they don't yet purchase.



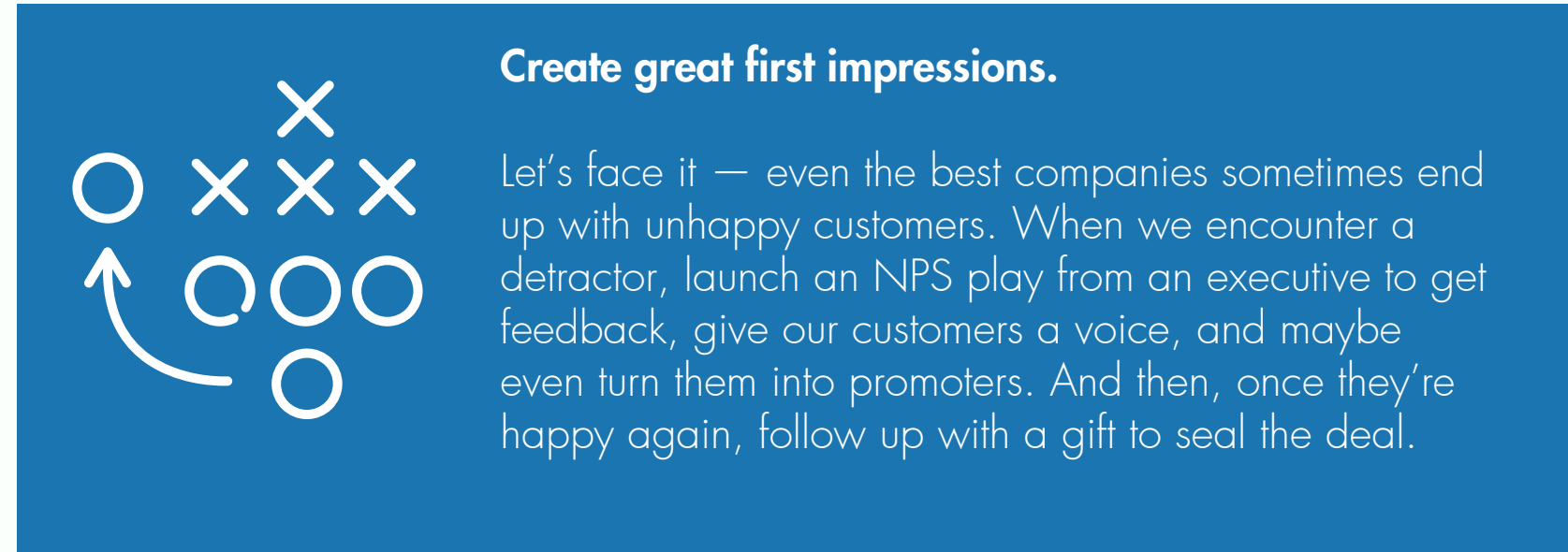


# After the Sale

## 15. The Extra Point [Gifts That Keep on Giving]

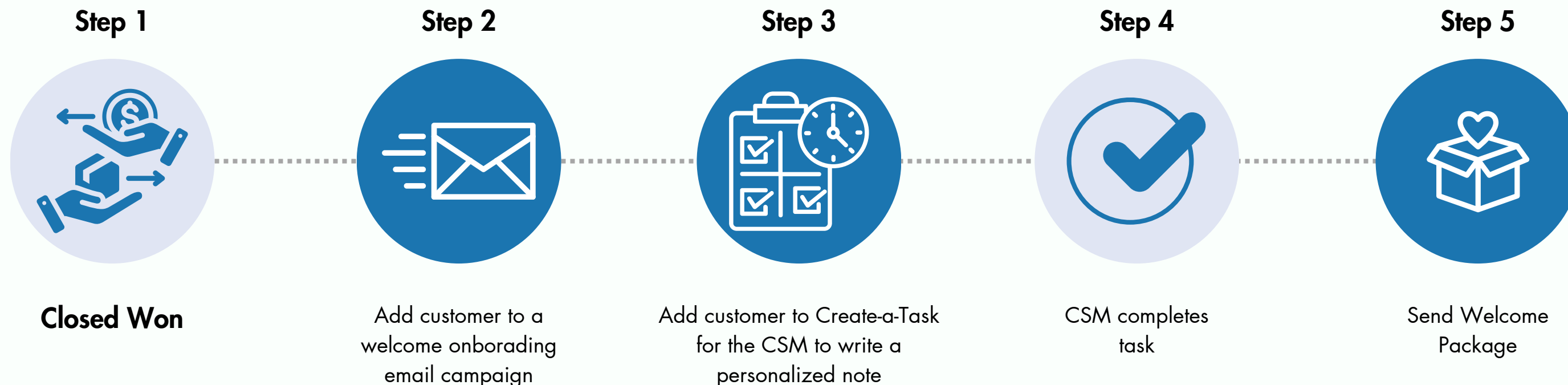
This play is for new customers. Cuz, heck, your company just cares.

Welcome packages are a great way to build customer loyalty and jumpstart your customer's learning process as they adopt your product. Sending over a box with some celebratory swag, some quick guides, and a letter introducing them to their Customer Support Manager and other relevant people at your organization is a good way to let customers know you care about them.



**Create great first impressions.**

Let's face it — even the best companies sometimes end up with unhappy customers. When we encounter a detractor, launch an NPS play from an executive to get feedback, give our customers a voice, and maybe even turn them into promoters. And then, once they're happy again, follow up with a gift to seal the deal.

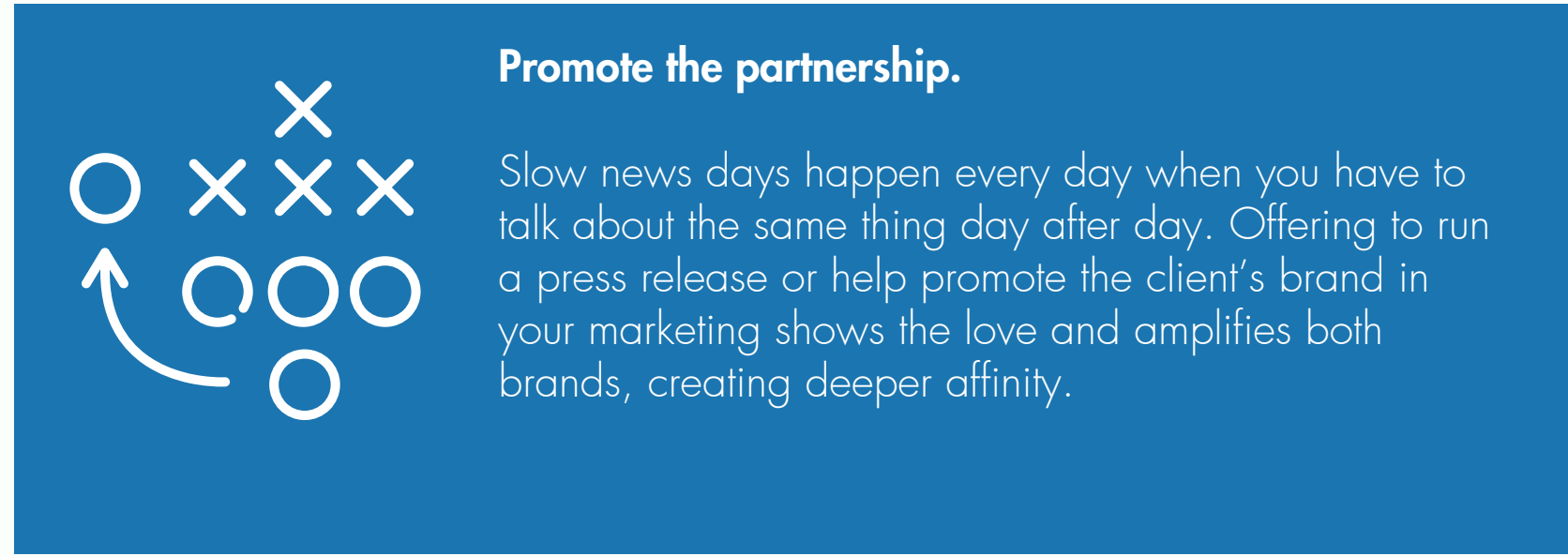


# After the Sale

## 16. The Amplify [To Grow the Love]

Having a customer advocacy program helps to build retention and affinity.

Customer advocacy is one of the single biggest ways that companies like yours can build their brand reputation and increase their revenue because a happy customer is a customer who stays. And poor retention is the enemy of any business!



**Promote the partnership.**

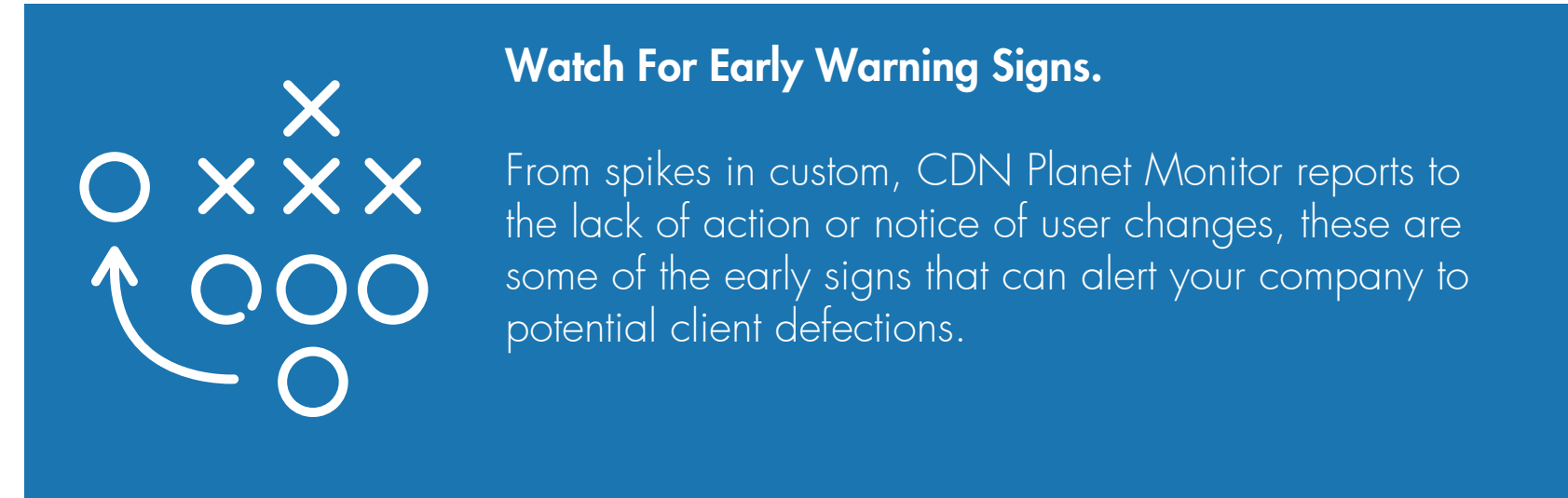
Slow news days happen every day when you have to talk about the same thing day after day. Offering to run a press release or help promote the client's brand in your marketing shows the love and amplifies both brands, creating deeper affinity.



# After the Sale

## 17. The Early Indicator [For More Renewals]

While it can be tricky to tell if a customer is at-risk for renewing, some examples are: not finishing onboarding, not spending enough time in the product, your product's champion leaving the organization, or surging on intent for one of your competitors.



**Watch For Early Warning Signs.**

From spikes in custom, CDN Planet Monitor reports to the lack of action or notice of user changes, these are some of the early signs that can alert your company to potential client defections.

### Step 1 Closed Won - New Customer

The process begins by identifying a new customer. Adding them to CDN Planet Reporting, customer onboarding sequences, newsletters, and custom care campaigns.

### Step 2a (early warning sign) Time In Portal

How frequently does the customer access portal? Do they know of enhancements or take advantage of tools?

### Step 2b (early warning sign) Incomplete Onboarding/Activaion

They miss onboarding calls or don't finish their QA process

### Step 2c (early warning sign) Competitor Like/Shares

Intent surge on competitor

### Step 2d (early warning sign) CDN Use Spikes / Monitor

We notice CDN testing or usage spikes via the CDN Planet Custom monitoring reports

### Step 3 Check In Chat

Create a task for the CSM to write a personalized note seeking to check in

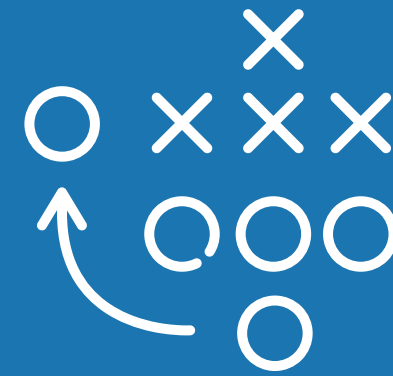
# Closed Lost Plays

## 18. The Safety [Closed Lost Analysis]

If a deal falls through, we need to know about it and understand why.

If the prospect doesn't share why they shifted from hot to not, then this is the time for marketing to put on its Sherlock Holmes hat and figure out what went wrong. Because the S.M.A.R.T ABM strategy targets the buying committee and not just an individual, automation follow-up may glean more perspective as to what drove the defection: price, geographic coverage, features/functions.

By better understanding the reasons for a sales loss, we can better advise product development roadmaps and trigger future outreach when your company has remedied buyer concerns.



### Sleuth out what went wrong.

Using a holistic approach, seek out what may have influenced the buyer to select a competitor. Later, approach again with multi-CDN or added functionality.



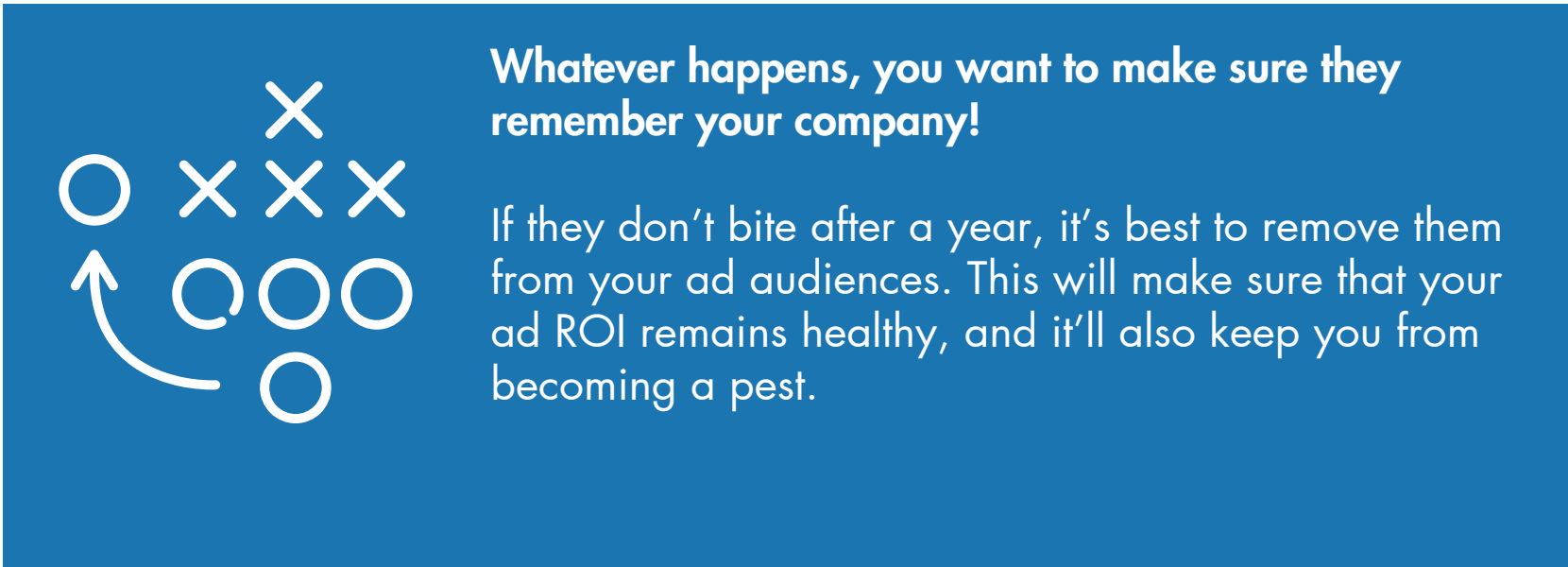


# Intent and Engagement Plays

## 19. The Blast [Closed Lost Ad Audience]

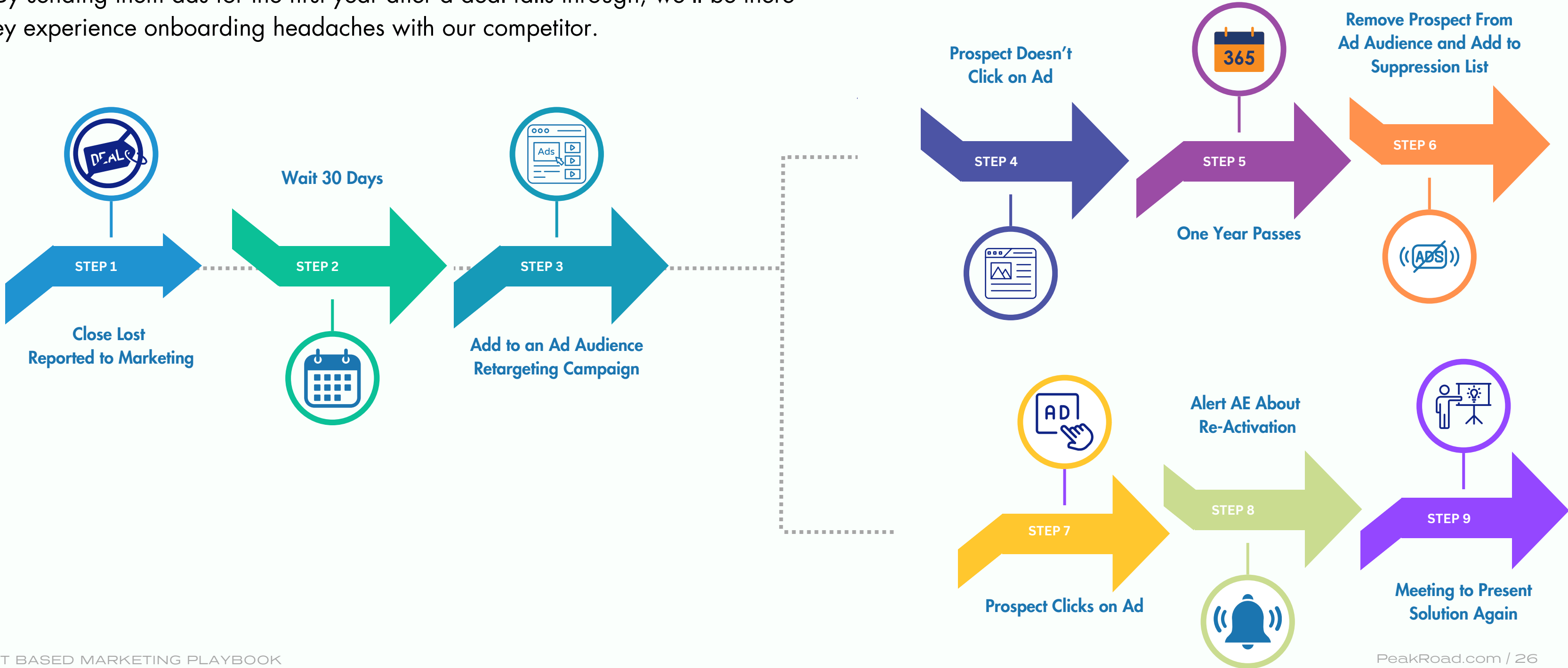
If a deal falls through, stay top of mind with ads for about a year.

When a deal doesn't close, because they went with a competitor, then ads are our friends. By sending them ads for the first year after a deal falls through, we'll be there when they experience onboarding headaches with our competitor.



Whatever happens, you want to make sure they remember your company!

If they don't bite after a year, it's best to remove them from your ad audiences. This will make sure that your ad ROI remains healthy, and it'll also keep you from becoming a pest.

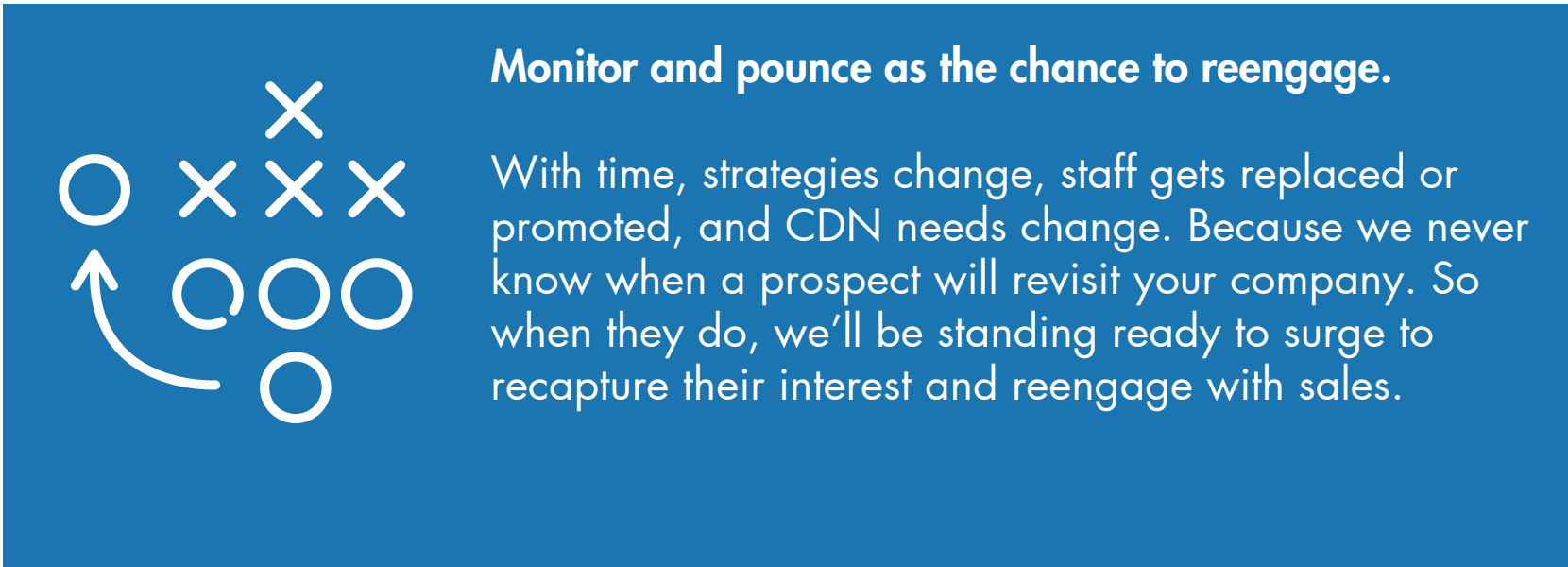


# Intent and Engagement Plays

## 20. The Surge [Closed Lost Intent Surge]

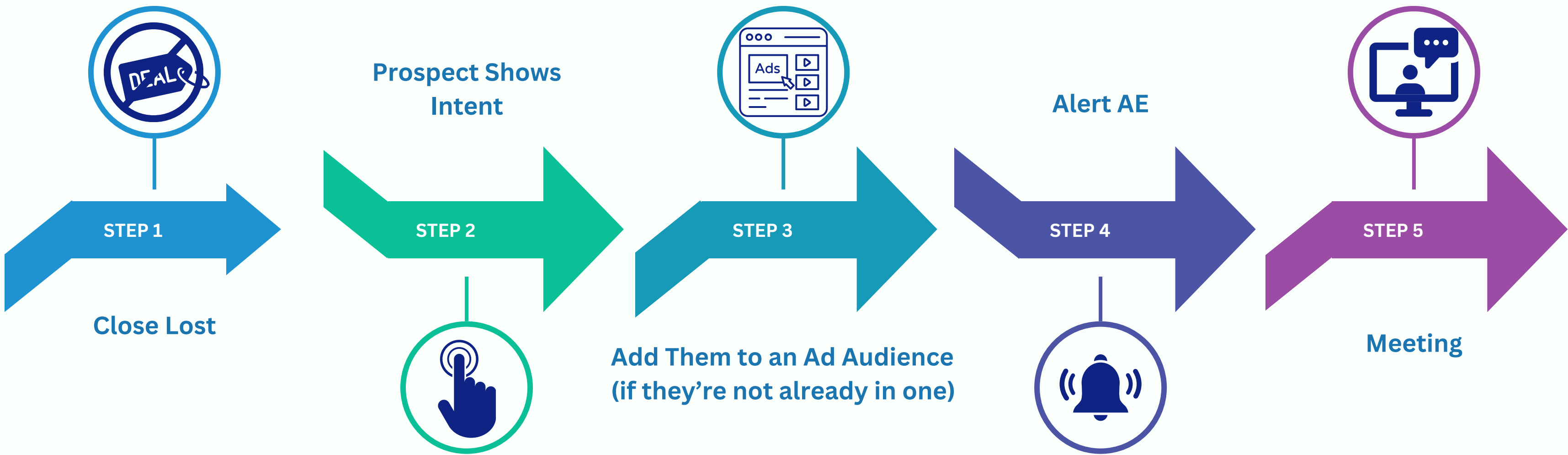
If a deal falls through, keep tabs on the account.

If the account surges on intent, interacts with your company in some way, or is showing signs of sales readiness in the news and in social media, then that's a great time to pick up the conversation again. After all, maybe they changed their mind. It never hurts to check!



**Monitor and pounce as the chance to reengage.**

With time, strategies change, staff gets replaced or promoted, and CDN needs change. Because we never know when a prospect will revisit your company. So when they do, we'll be standing ready to surge to recapture their interest and reengage with sales.



# Tool Use in the S.M.A.R.T ABM Process

- **CRM Systems** - Sales tags account as ABM Target, Marketing adds ABM contacts into their assorted email campaigns based on buyer type (RACI - responsible, accountable, consulted, informed).
- **PR Alert System** - creates push notifications when ABM is in news regarding:
  - Acquisitions
  - Awards
  - Conference Presentations
  - Leadership Changes
  - Partnerships
  - Product Launches
  - Restructuring
- **CDN usage alert system** - while not 100% accurate, CDN Planet offers a monitoring system for named accounts. We can ID when ABM targets and existing clients shift or test CDN traffic.
- **LinkedIn Avatar or Personnel's Account(s)** - used by SDRs.
- **LinkedIn Retargeting Ads** -
  - About your company
  - Services
  - Unique Sales Proposition
- **Website visitor monitors** - alert us when employees of ABM Brands visit our website.
- **AI System for Support**
  - **Some Systems we could deploy include:**
    - Website AI tool to improve visitor conversion
    - Visitor tracking capture tool & automation for outreach
    - CRM powered by AI writer to personalize anonymous site visitor outreach
    - Video Clip creator / anycast
    - 1:1 landing page AI



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**At Peak Road, we understand that the future of B2B sales is here – and it's personalized.**

Our executives and project teams walk into tough situations and employ world-class strategic and tactical abilities to get a company to where it needs to be in the shortest amount of time possible. Once a fix is complete a company doesn't need to worry about what to do with an interim executive long-term.

### **Ready to Put SMART ABM into Action?**

Peak Road Partners can help you seamlessly implement SMART ABM strategies tailored to your business. Our expert team will guide you through every step to accelerate revenue and foster long-term growth. Contact us today to start your SMART ABM journey!