

# LeanData

## **7 STEPS TO ORCHESTRATING A WINNING ACCOUNT- BASED MARKETING STRATEGY**

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# UNDERSTANDING ACCOUNT BASED MARKETING



# WHAT IS ABM & WHAT MAKES IT DIFFERENT?

Account-based marketing, or ABM, is a go-to-market (GTM) strategy that focuses on specific customer accounts.

Instead of casting a wide net, you choose the accounts that matter most and engage them with a coordinated approach across marketing, sales, and customer teams. This helps every part of your organization stay aligned with the buyer journey.

Traditional lead based marketing centers on individuals. Marketers create broad campaigns for a set of personas and then sort new leads into accounts as they appear. ABM flips this order. You identify the right accounts first, evaluate their fit, and then shape your programs around the people within those accounts.

## **Modern ABM also includes more than fit and firmographic data.**

Teams now watch signals across many systems to understand interest and timing. These signals can include website behavior, intent data, event activity, and product usage. Marketers use these insights to engage accounts in ways that match where they are in their journey.

ABM continues to be a core strategy in B2B companies because it brings focus, stronger alignment, and a better experience for buyers. While the methods have evolved with new technology, the foundation remains the same.

Choose the right accounts, understand what matters to them, and stay coordinated as they move from early interest to evaluation.

# 80%

of B2B organizations  
report having ABM  
programs.

– [6sense](#)

# 81%

of marketers  
say ABM delivers a higher  
return on investment than  
other marketing  
initiatives.

– [Demandbase](#)

# 38%

B2B companies with ABM  
programs report a 38%  
higher sales win rate.

– [Salesforce](#)



**“ABM is a strategy built for the long game. Focus on the right accounts, support them with a clear framework, and give your teams a plan they can trust. That is when the impact shows up.”**

**– Gia Cross,  
Sr. Demand Generation Manager  
LeanData**

# THE BENEFITS OF ABM

ABM's targeted approach is highly effective in driving engagement, closing deals, and building long-term relationships in B2B sales.

**Some of the proven benefits of ABM include:**



## **PERSONALIZED MARKETING APPROACH**

ABM allows for highly tailored marketing strategies that cater to the specific needs and pain points of individual accounts.



## **HIGHER ROI**

By focusing on high-value accounts, ABM can yield a higher return on investment compared to broader marketing strategies. Resources are concentrated on accounts with the highest potential for revenue.



## **BETTER ALIGNMENT BETWEEN SALES AND MARKETING**

ABM fosters better collaboration between sales and marketing teams. Both departments work together to identify target accounts, develop customized strategies, and engage key decision-makers.



## **SHORTER SALES CYCLES**

Targeted efforts on high-value accounts often lead to shorter sales cycles. Personalized content and direct engagement can accelerate the decision-making process, as prospects receive relevant information quickly.



## **IMPROVED CUSTOMER EXPERIENCE**

With ABM, prospects and customers receive a more personalized and relevant experience. Tailored content, messaging, and interactions ensure that the needs of each account are met effectively.



## **BETTER MEASUREMENT AND ANALYTICS**

ABM provides clearer metrics and analytics. Since the focus is on a defined set of accounts, it is easier to track engagement, measure the impact of marketing efforts, and adjust strategies based on specific data points.

# WHAT'S IN A NAME — ABM, ABS, & ABX?

In B2B sales, account-based marketing (ABM), account-based selling (ABS), and account-based experience (ABX) all center on working the right accounts with focus and coordination. Each one supports a different part of the buyer journey.

## » ACCOUNT-BASED MARKETING (ABM)

In ABM, marketing creates personalized campaigns for specific accounts and works closely with sales to shape the outreach. Content is highly personalized to speak to the needs and interests of each account. The goal is to engage key decision-makers and guide them through the next step in the buying journey.

## » ACCOUNT-BASED SELLING (ABS)

ABS continues the work that ABM starts. Sales teams take engaged accounts and move them toward a deal. Many companies also use ABS to describe a shared strategy for how marketing and sales work accounts together.

## » ACCOUNT-BASED EXPERIENCE (ABX)

ABX represents account-based experience or account-based everything, depending on with whom you speak. ABX takes an account-based approach through marketing, sales, and customer success, to deliver a cohesive, personalized experience throughout the entire customer lifecycle.

Companies with ABM programs report

**91%**

larger deal sizes,  
leading to

**24%**

faster revenue growth.

- Salesforce

These labels can feel confusing, but the core idea is simple. Strong account-based programs rely on clear targets, shared visibility, and steady alignment across teams. That is why ABM continues to serve as a growth motion for companies that want their go-to-market to match the buyer journey.

# **7 STEPS TO ORCHESTRATING YOUR ABM STRATEGY**





# STEP 1: CONDUCT AN EVALUATION

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The first step in building a strong account-based motion is to run a clear evaluation of your current efforts. Look at what works well and where you see gaps.

Use both numbers and team feedback to understand how accounts move through your marketing and sales programs.

**A good evaluation looks at several areas:**

- » How well do your tech systems connect?
- » How easily can teams see account activity?
- » Are you capturing the right signals to guide next steps?

Clean data, shared visibility, and steady communication between teams make a big difference in how ABM performs.

This early work gives you a helpful baseline. It shows you where to focus and sets the stage for a more aligned strategy across your revenue teams.

**Companies using ABM for at least one year realized a 10% increase in revenue, while 19% of companies reported revenue growth of over 30%.**

**- Demandbase**

# STEP 1: CONDUCT AN EVALUATION (CONTINUED)

## » REVENUE TEAM DESIGN

Evaluate how well marketing, sales, and customer success understand account needs and whether they stay aligned through regular reviews and shared metrics. Make sure your team can build a target account list quickly and update it as signals change. You cannot run an account-based motion without a target account list.

## » PLAY EXECUTION

Review how well your plays engage people inside each account. Look at whether outreach feels relevant and whether it helps move contacts through their buying journey. Strong plays surface strong buying signals and build on sales feedback.

## » REVENUE TECH STACK

Check whether your tools can pull in buyer signals and help teams see important activity at the right time. Successful ABM programs rely on clean data and a clear view of the account.

## » PROGRAM ORCHESTRATION

Confirm that your tech stack can support steady execution. Your system should help automate plays for marketing and sales so accounts receive timely engagement that matches their stage.

## » METRICS AND MEASUREMENT

Evaluate how well your organization measures progress. Your team should be able to track movement across the full funnel and understand how accounts advance through their journey.

**Companies deploying ABM generated 200% more revenue for their marketing efforts compared to those that don't.**

**- FlipMyFunnel**

# STEP 2: ALIGN THE FUNCTIONS OF YOUR REVENUE TEAM

Alignment between marketing and sales often sounds like a simple idea, yet most teams drift out of sync faster than they expect. Markets shift, roles evolve, and new signals appear. Teams must stay connected through regular communication and shared goals.

## ALIGNMENT IS ONGOING

Even strong teams need steady attention to remain aligned. Clear expectations, open feedback, and shared visibility into account activity help everyone move in the same direction.

Misalignment usually stems from **four common issues**:

**Only 52% of sales and marketing teams share common goals and metrics, which is crucial for fostering collaboration and ensuring both teams work towards the same objectives.**

**- Salesforce**

1

### Different Goals and Metrics

Sales often focuses on revenue targets and deals, while marketing looks at long-term branding, lead generation, and nurturing. When teams measure success in different ways, they struggle to stay on the same page.

In addition, marketing may focus on metrics like lead volume and website traffic, while sales prioritizes conversion rates and revenue. These differing objectives can create tension and misalignment.

2

### Different Processes and Tools

When sales and marketing teams use different processes, tools, or technologies, information gets lost. For example, using separate CRM and marketing automation platforms may lead to data silos and inconsistent reporting.

3

### Limited Buy-in

Many sales teams are skeptical about integrating ABM into their selling strategies. They may think ABM produces fewer leads. Other times, sales teams may have been burned by aborted ABM efforts that didn't produce results.

4

### Lack of Joint Planning and Strategy

When teams plan in isolation, their work begins to drift. Regular planning sessions help marketing and sales align their goals, decide how to engage accounts, and support each stage of the buyer journey.

# STEP 2: ALIGN THE FUNCTIONS OF YOUR REVENUE TEAM (CONTINUED)

## 3 STEPS TO ALIGN YOUR REVENUE TEAM

Use the following three steps to fully align your revenue team:

1

**Bring your sales, marketing and customer success teams into the ABM strategy from DAY ONE.**

- » Whether this takes one meeting or several, each team needs a clear, shared understanding of your ABM approach, why it matters, and how their work supports it. Everyone should see how ABM connects to the buyer journey and how a coordinated motion helps the entire company.
- » From the very beginning, ABM will require shared objectives, metrics and key performance indicators (KPIs).

2

**Train functional teams on the new ABM playbook.**

- » Train teams on the ABM playbook so they understand how it differs from broad lead generation. ABM centers on influencing accounts and learning from engagement patterns. Help teams shift to an approach that uses combined data to support accounts rather than individual leads.

3

**Collaboratively execute upon your ABM strategy.**

- » Alignment at the beginning of an ABM program does not last without steady coordination. Weekly reviews help leaders in sales, marketing, and customer success understand account engagement and adjust plays as needed.
- » Each account will move differently, and each review offers a chance to refine outreach and coach team members. Strong ABM programs rely on a cycle of testing, learning, acting, and improving.

# STEP 3: IDENTIFY TARGET ACCOUNTS

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A logical place to start your target account list is your ideal customer profile (ICP). Your ICP is, in fact, important, but don't jump there right off the bat.

First, be very clear on your goals for an ABM campaign. Growth is the top-level goal, but you will need to look deeper at what kind of growth your teams want to create.

Your ABM objectives guide how to build your account list. These objectives may include the following:

## **RENEWALS, UPSELLS AND CROSS-SELLS**

If your team sees strong potential in your customer base, start with your current accounts.

## **NEW LOGOS AS “SOCIAL PROOF”**

If you want to move into larger markets, you may target known brands that help strengthen your reputation.

## **ACCELERATING EXISTING OPPORTUNITIES**

If deals are slowing, focus on accounts already in your pipeline to help them move forward.

## **LAND AND EXPAND**

If you plan to grow within complex organizations, build a list of companies with several business units or subsidiaries.

If the objective of your ABM strategy is to more aggressively grow new customers who are in your “best fit” category, that’s where your ICP falls into play. However, resist the temptation to jump into your ICP blindly.

### **Evaluate your ICP every year.**

Your ICP reflects the customers who serve you well today. But, markets shift and so do your products and services.

Ask yourself if these profiles still represent the customers you want to reach next year. If they do, continue with confidence. If you have doubts, update your ICP so it matches where your company is headed.



# STEP 4: CREATE AND CURATE CONTENT FOR TARGET ACCOUNTS

A core part of any account based strategy is creating and delivering content that feels relevant to each account. Once your team has alignment and a clear process, begin shaping content that encourages engagement and supports the buyer journey.

## » CONTENT TYPES

Your content may include blog posts, briefs, eBooks, videos, events, and other formats. Use a mix of online and offline channels to reach accounts in the places where they already show interest.

## » ADDRESS PAIN POINTS

Content should speak to the challenges your target accounts face or help with specific roadblocks your sales team encounters. Strong ABM programs use signals from engagement tools, sales conversations, and past behavior to guide what to say and when to say it.

## » REPURPOSE CONTENT

Look for ways to reuse content with small adjustments. Much of what you create will work across several accounts. Refine the remaining parts to match the needs and language of your audience so the content feels tailored without creating everything from scratch.

**Marketers still rely on foundational systems to operationalize ABM:**

**62% rely on a CRM and 52% use a marketing automation platform (MAP).**

**- 2025 Account-based Marketing Benchmark Survey**





# STEP 5: DEVELOP ABM PLAYBOOKS

ABM success depends on clear playbooks that guide every customer facing role. Each play should outline how teams engage accounts, what steps they follow, and how they use signals to move buyers forward. Once created, train your revenue team so they understand their part in each play.

## » WHAT'S IN YOUR ABM PLAYBOOK?

Your ABM plays bring together two elements: (1) target accounts — complete with profiles of all the influencers, decision makers and budget holders, and (2) your best content.

## » IDENTIFY THE BEST CHANNELS

Choose channels that match how your accounts prefer to engage. This may include LinkedIn, email, direct mail, events, or targeted pay-per-click (PPC) ads. Use signals and past engagement to guide timing and help sales and marketing work from the same plan.

## » TAILOR MESSAGING TO THE ACCOUNT

Your campaigns will undoubtedly share similarities, but each campaign should be tailored to a particular account. Every message and all related content that each individual in an account receives should look and feel as though it was created specifically for them.

## » IN PERSON VERSUS DIGITAL

With today's self-guided buyer journeys, much of your ABM playbook will encompass digital plays. However, in-person interactions should be included in playbooks as well. Use meetings, workshops, or small events to deepen relationships and bring multiple stakeholders together.

## » BUILD RELATIONSHIPS

Give sellers content that helps them start conversations and learn more about each account. As relationships grow and signals increase, your content and plays will become more focused. This helps teams stay aligned and adapt as accounts move through their journey.



# STEP 6: MEASURE & ANALYZE

The long term success of ABM depends on a clear understanding of how your accounts move through the buyer journey. ABM programs often lose momentum when teams cannot see early progress or do not measure signals that show accounts are warming.

## WHAT WILL YOU MEASURE?

**For micro-metrics,** review the signals that show account engagement. These may include:

- » Website visits
- » Email opens and click throughs
- » Downloads
- » Events
- » Meetings
- » Lead scores
- » Opportunities
- » Closed/Won
- » Closed/Lost

**For macro-metrics, or big-picture metrics,** evaluate the broader impact of your ABM efforts. Look at:

- » Revenue growth
- » Deal size
- » Conversion rates
- » Pipeline growth
- » Account retention and expansion
- » Customer lifetime value

## HOW OFTEN SHOULD YOU MEASURE?

### How Often Should You Measure?

During the alignment phase of ABM, you developed shared metrics and KPIs. For micro-metrics, **revisit them weekly.**

Create easily accessible and transparent scorecards of shared analytics that keep your revenue team aware of all activities and engagement by account.

Macro-metrics are best analyzed quarterly.





# STEP 7: CONTINUOUSLY IMPROVE

ABM motions offer steady opportunities to learn. When you focus on each account as its own market, you begin to see patterns across roles and teams. Some plays create strong engagement. Others fall flat. Pay attention to both.

## » CONDUCT DEBRIEFS

Don't wait until an account has moved to either Closed/Won or Closed/Lost to conduct a debrief. Review accounts throughout the process. Look for signals that show growing interest, and note the plays that encourage movement. Use these insights to support similar accounts and to refine your approach.

## » WHAT'S NOT WORKING?

Additionally, study the tactics that are not delivering results. Watch for warning signs that your ABM strategy is not working:

- » Low engagement
- » Stagnant or declining pipeline
- » Poor conversion rates
- » High customer acquisition costs
- » Low retention and expansion rates
- » Negative feedback from target accounts

Consider what changes may improve your efforts. Update plays, shift timing, or adjust messaging based on the signals you observe. Continue to experiment and refine.

Strong ABM programs learn, adapt, and improve over time.

**Marketers running ABM programs report a 70% improvement in the quality of opportunities created.**

**- 2025 ABM Benchmark Study**



# FROM FRAMEWORK TO EXECUTION



# AI AND ACCOUNT BASED MARKETING

AI is becoming a core part of how teams plan, prioritize, and refine their account based motions. While the fundamentals of ABM have not changed, the way teams interpret signals and decide when to engage has. AI helps revenue teams see patterns earlier, understand account momentum, and adjust their plays with more confidence.

## INTERPRETING SIGNALS WITH MORE CLARITY

Teams gather a growing mix of intent, engagement, and behavioral signals, but not all signals carry equal weight. AI helps teams surface the ones that matter most and connect them to the right accounts and people.

## STRENGTHENING GTM ORCHESTRATION

AI also supports the shift from simple account engagement to coordinated GTM orchestration. As organizations mature their ABM programs, AI can guide how teams sequence plays, understand buying patterns, and coordinate outreach across revenue roles.

“AI is becoming part of how ABM gets done. I use it every day to write copy, test ideas, and make personalized experiences smarter. If you’re not bringing AI into your ABM or ABX strategy, you’re already behind.”

**Gia Cross**  
Sr. Demand Generation Manager  
LeanData

**68%**

of marketers said AI improves their ability to identify in market accounts.

**62%**

of ABM practitioners believe AI will have the biggest impact by improving how teams interpret intent and engagement signals.

**56%**

of B2B organizations plan to invest in AI powered tools to support GTM orchestration in the next year.

– 2025 Account-based Marketing Benchmark Survey

# ABM AS THE FOUNDATION FOR A BUYING GROUPS MOTION

ABM teaches teams to focus on the accounts that matter most, build coordinated programs, and engage multiple stakeholders across a company. It creates shared visibility, aligns sales and marketing, and helps teams understand the signals that show when an account is starting to move.

Those strengths make ABM the natural starting point for a Buying Groups Motion.

## » WHERE ABM STOPS AND BUYING GROUPS BEGIN

ABM identifies the right accounts. Buying Groups identify the right people inside those accounts who influence a specific opportunity. Forrester research shows that B2B decisions now involve an average of 13 people, which means accounts often contain several potential buying centers, each with different needs and roles. ABM alone cannot provide that level of precision.

## » WHY BUYING GROUPS BUILD ON ABM

A Buying Groups Motion takes the foundation ABM creates and adds structure at the opportunity level. It helps teams:

- » Understand who is involved in each deal
- » Connect signals across stakeholders
- » Shape more coordinated follow up
- » Improve conversion rates as groups become fully engaged

In this way, ABM builds pipeline and a Buying Groups Motion accelerates it.

“We had accounts showing interest but we could not tell who within that account mattered to the deal. That gap made it hard for sales to know where to focus. Buying Groups gave us a clearer way to understand the roles inside each deal and what engagement looked like across that group”

**Jean Cameron**  
Sr. Director, Field and Partner Marketing  
Demandbase

# EXECUTING ABM WITH LEANDATA INTELLIGENT GTM ORCHESTRATION

LeanData improves ABM by giving teams shared visibility into every account. Our best-in-class lead-to-account matching ties signals and inbound activity to the right place, helping teams see who is engaging and how interest builds across roles.

## » POWER FASTER AND MORE CONSISTENT FOLLOW UP

LeanData routes inbound activity to the correct owner based on account fit, territories, and past engagement. This reduces response times and keeps sales, marketing, and customer success aligned on who should act.

## » TRIGGER THE RIGHT PLAYS WITH THE RIGHT SIGNALS

ABM playbooks work best when teams respond at the right time. LeanData activates plays when accounts show interest through forms, events, or website activity. Teams can see which accounts are warming and which contacts show signs of movement.

## » SUPPORT OPPORTUNITY LEVEL CLARITY AS COMPLEXITY GROWS

As deals advance, LeanData helps teams understand who is involved, and how to coordinate engagement. This structure supports ABM at scale and creates a smooth path into a Buying Groups Motion when opportunities become more complex.



## SNOWFLAKE SCALES ABM WITH LEANDATA

### SNOWFLAKE'S ABM RESULTS

- » 1 to 3 hours saved per SDR per day on inbound research
- » Under 5 minutes response time to demo and contact requests
- » 99 percent reduction in operations time for routing updates
- » 2X to 4X increase in SDR efficiency through One-Team GTM plays powered by LeanData

### HOW SNOWFLAKE USES LEANDATA FOR ABM

- » Lead-to-account matching shows who is engaging across the account
- » Routing delivers warm leads to the correct SDR instantly
- » Signal-based plays use Snowflake and LeanData data together to trigger next steps
- » ABM marketers and SDRs run coordinated, targeted "tactical strikes" across global territories



# ABM IS HERE TO STAY

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ABM is not a trend.

It has become the way modern teams focus their efforts and spend time where it truly counts. Many companies do not even label it as ABM anymore. To them, it is simply how they go to market.

ABM puts the right accounts at the center of your work. It gives marketing, sales, and customer success a shared view of who matters and how to show up with intention. When teams coordinate their plays and respond to real signals, they create moments that feel personal and build trust over time.

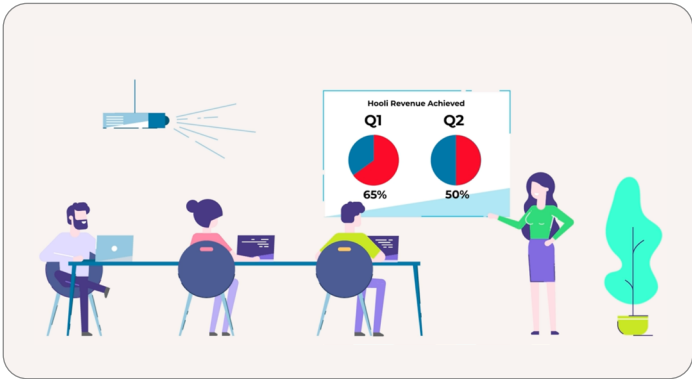
ABM also demands ongoing orchestration. Markets shift, buying groups change, and engagement patterns evolve. Teams need to stay close to their data, learn from every account, and adjust their plays as signals emerge.

So, keep your process simple, stay curious, and improve a little each time.

Your customers will notice the difference, and so will your bottom line.



# RECOMMENDED RESOURCES



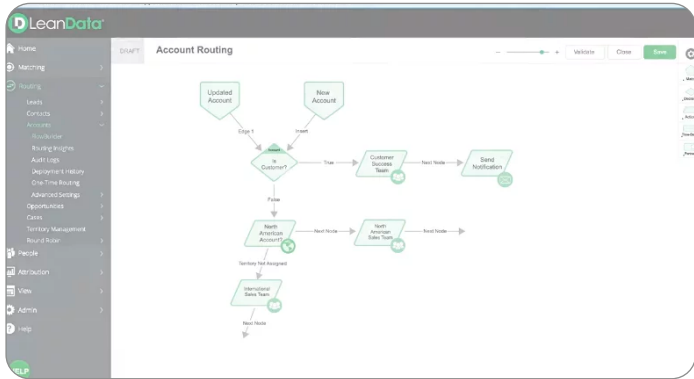
VIDEO

[Implement an Account-based Strategy with LeanData](#)



VIDEO

[Snowflake Scales Account Based Plays with LeanData Revenue Orchestration](#)



VIDEO

[LeanData Account-based Routing](#)

## GET STARTED TODAY

Visit [LeanData.com](https://leandata.com) to learn more about LeanData’s go-to-market operations solutions for Automated Scheduling, Matching, Routing and Engagement, or visit us on the Salesforce [AppExchange](#).

REQUEST A DEMO

## Why LeanData?

LeanData helps B2B enterprises fuel efficient growth by aligning marketing, sales, and customer service execution with the buyer journey. Our Intelligent GTM Orchestration platform acts as the connective tissue across the revenue lifecycle, integrating and normalizing buyer data, automating signal-driven workflows, and delivering AI-powered insights. The result is faster, cleaner execution and the ability to adapt GTM motions with agility without coding. More than 1,000 leading companies and a community of 5,000+ OpsStars rely on LeanData to achieve speed to lead, higher conversions, accelerated pipeline, and predictable growth by turning buyer signals into coordinated action.

