



# THE MFS GUIDE TO B2B ACCOUNT BASED MARKETING

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How To Successfully Launch, Roll-out,  
and Scale an ABM Program

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# INTRO



**B2B Account Based Marketing or ABM is an approach that has surged in popularity over the last decade. ABM is based on the idea that a one-size-fits-all marketing strategy is no longer suitable - particularly when it comes to landing larger enterprise level deals. Instead, companies are switching to an account-based approach based, essentially, on treating each target account as a separate market in its own right.**

The rise in ABM adoption stems from changing buyer behaviors. Enterprise B2B opportunities have evolved to the point that there is now an average of 10 or more stakeholders involved in the decision-making process. Each stakeholder comes with different priorities, needs, and concerns - the potential benefits of your product that you relay to a revenue-focused head of sales are unlikely to resonate with a CIO (Chief Information Officer) or CISO (Chief Information Security Officer) who prioritizes system security. As a result, the focus for selling companies then turns to personalization - taking the time to identify and articulate the value proposition and how it relates to each stakeholder.

This highly personalized buyer experience is now expected and the effort required to deliver it is considerable - but not unmanageable. In fact, delivering this personalized buyer experience is precisely where ABM fits in. It does however require close-knit cooperation between the sales and marketing functions all in the name of ABM. Furthermore, ABM requires executive sponsorship and must be treated as a strategic initiative - a solo run from an ambitious marketing or sales person won't do.

In this guide we delve more deeply into the area of ABM and share with you our ABM definition, best practices, tactics, metrics and more - giving particular focus to ABM activities we have seen to generate the best results from over the past 15 years in the B2B environment.

# B2B ABM DEFINITION

There are a number of ABM definitions floating around currently, but the one we like most is the definition put forward by Bev Burgess and others that terms **ABM as a strategic cross-functional sales and marketing approach targeting high value accounts as markets in their own right.**



Within ABM, there are a number of different approaches:

- ✔ **One-to-One ABM or Strategic ABM:** This approach is based on a highly tailored and personalized one off campaign targeting an individual account.
- ✔ **One-to-Few ABM or ABM Lite:** This ABM approach is based on campaigns that target a small number of accounts where the personalization element is based on commonalities between the targeted companies.
- ✔ **One-to-Many ABM or Programmatic ABM:** This approach is still based on the concept of personalization, but it uses technology to scale an ABM campaign towards a larger number of accounts that share common characteristics.

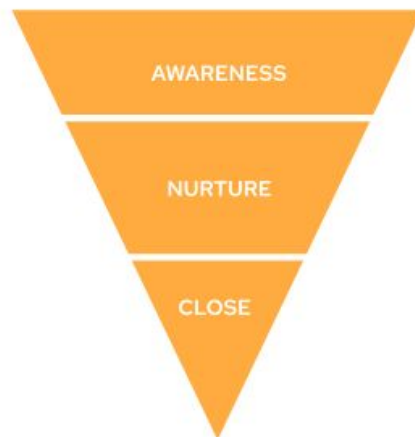
## DEMAND GENERATION V ABM

In many ways, ABM flips around the traditional marketing funnel which begins with the awareness stage, moves onto lead nurturing, before closing. With ABM, the first step is to identify the accounts you want to target, the second step is engaging, and finally move onto closing - albeit with a view to continually growing and expanding the account.

ABM FUNNEL



DEMAND GEN FUNNEL



The more traditional demand generation approach casts a wide net for customers through a mix of inbound and outbound methods. At the core of this approach is a more general brand and product positioning that has been developed to target a wider audience and establish initial presence within the target market. Many of the same tactics are used in both demand generations campaigns, but they are used in different ways. The content, email marketing, PPC campaigns etc. that are used as part of demand generation initiatives is much broader than ABM and will usually target the general buyer persona of the entire target market. These tactics, when used in an ABM capacity, are all tailored to the target company or "market of one".

In spite of the differences between the two approaches, there is not necessarily an inference that one way is better than the other. In fact, demand generation and ABM both have an important role to play in the modern B2B environment and it is up to individual companies to figure out when and how to use each approach.

One example use case for the more general demand generation approach might be a situation where a startup makes an initial foray into an established market and is looking to build up brand awareness and win some early customers. Activities such as PR, SEO, and analyst relations may be used at this stage to attract some buyer interest. With market position established, a maturing company might think about implementing ABM to land some high value accounts. ABM is ideally suited to companies looking to grow their deal size and win some deals with companies in the Fortune 100.

A further advantage of ABM is that it can help companies make the most effective use of sales and marketing resources. With sales and marketing working together to land target accounts, the lead qualification debates get put to one side. Everything needs to be done in tandem. Sales and marketing resources are applied to an account or accounts where there is both an established need and the potential ROI for closing a deal is huge.



# B2B ABM BEST PRACTICES

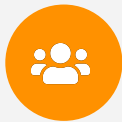
Before designing an ABM strategy, it is worth keeping some best practices in mind. These guidelines can help you build a successful ABM program.



**Think Strategically** - ABM is not simply another tactic. In fact, if you treat ABM as a tactic, there is every chance your ABM program will flop. ABM, in order to succeed, needs to be treated as a strategic initiative. It should be supported by the executive team and given the resources it needs to succeed.



**Get Executive Sponsorship** - ABM must be a priority for those highest in the organization. Before trying to get buy-in from sales and marketing teams, you must secure executive support. The program will not work otherwise.



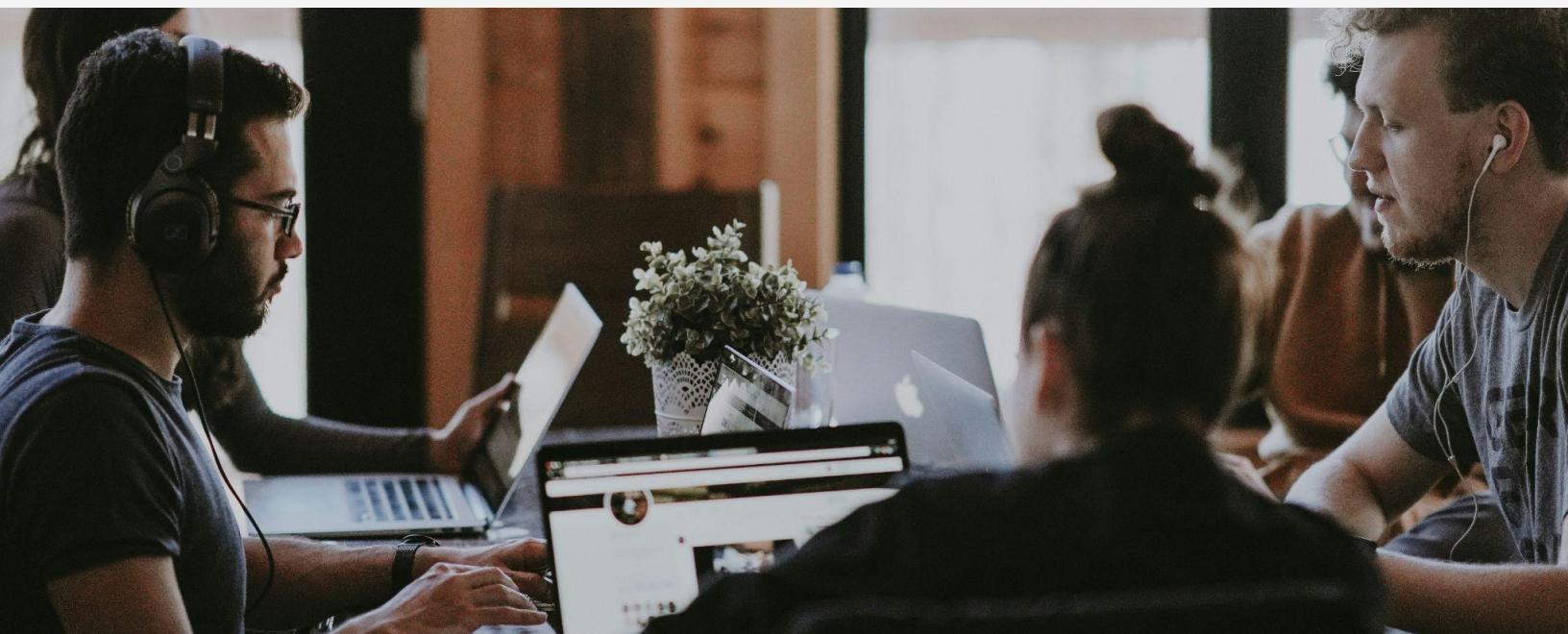
**Align Sales and Marketing Teams** - Alignment is key. ABM is a cross-functional sales and marketing strategy. In fact, you will need to build a separate ABM team - containing people from both marketing and sales - to implement and execute your strategy.



**Conduct an ROI Analysis** - ABM is not for everyone. A quick way of sussing out if ABM is suitable for your needs is to conduct an ROI analysis. Weigh up what your average deal size is and what the cost of your ABM program is. If you are targeting low dollar value accounts, then you should realistically focus on areas like optimizing the self sign-up process rather than ABM. ABM is best suited to larger enterprise level deals.



**Pilot Your ABM Program** - An ABM program requires considerable resources to set up in terms of personnel, content, systems, etc. For marketing and sales teams it is essentially a new way of working. Before embarking on what can amount to a reorg, you should pilot your ABM program by targeting a small number of accounts. If you can pilot your ABM initiative successfully with a closed deal, then you will have living proof of the merits of your program and you can build it out from there.





**Find Your Content Monster** - ABM is powered by content. With personalization at its core, an ABM strategy requires an enormous amount of content. You will need a content resource you can rely on to produce high quality, tailored content - and produce it at volume. You - as an ABM leader - can work with your content resource initially as you develop unique value propositions for each account and decision-maker within the account. From here though, you will need your content resource to take the lead and start building out this content at scale. Your content resource should also have the flexibility to quickly turnaround new pieces of content as new and evolving buyer needs emerge throughout the sales cycle.



**Finetune Your ABM Tech Stack** - As you design your ABM strategy, ask yourself the question - do you have the systems in place that you need to execute? If you don't, then you will need to select and implement some new technology. Start off by ensuring you have the basics with CRMs, marketing automation tools, market research, and intelligence platforms in place. Consider then how you can augment what you have with AI and other ABM-specific tools that have entered the market.



**Take a Land and Expand Approach** - Remember, many of the companies in the F100 have revenue larger than some countries GDP. If you have an existing deal in place, there may be additional teams or offices that your product can also add value to. A key part of ABM will be expanding business lines with existing customers.



**Build an ABM Dashboard** - Take the time to build a live ABM dashboard that gives both the ABM team and executives instant visibility into the revenue generated from the ABM program. Create a custom report with visuals that shows progress with each of the target accounts. Keep it high level - the executive team will focus on one metric in particular - revenue.

# B2B ABM TACTICS

There are any number of marketing and sales tactics you can use as part of your ABM program. The best ABM campaigns are tailored to the needs of decision-makers at target accounts. You must figure out through in-depth research the needs and priorities of target decision-makers and then you need to decide which tactics or channels to focus on to get your message in front of the right person. Creativity here is also important. Don't be afraid to go down alternative or left-field routes. Lots of B2B marketing today is generic, so it may well be the creative route that opens the door to a large target account. In this section, we will go over some of the tactics we have seen to generate the best results.



- ✓ **Target Account Research** - Not so much a tactic as a necessity, researching your target accounts is a non-negotiable. One of the best ways you can research target accounts is simply to go on to their websites and navigate to the investor relations area where you will be able to see transcripts of quarterly earnings calls and annual meetings. Here you will be able to learn about key strategic initiatives for the company as well as their priorities and challenges. You will also learn about the key personnel and who is involved with each initiative. For those target companies that are not publicly listed, you will have to do some further digging into news stories, social media posts, and any other publicly available information that might be relevant. Don't forget to do some searches on internal systems like CRMs etc. where valuable insights on target accounts might already be stored.
- ✓ **Target Account Alerts** - Set up real time alerts for news stories about your target accounts via Google Alerts and other services. Monitoring social media mentions is also advisable. For this tactic to work, you need to think in terms of "triggering events" - is there an event be it software breach, management change, supply chain disruption etc. that would highlight the need for your service or product. By staying on top of the latest news about target accounts, you will give yourself the best chance to strike while the iron is hot and time your outreach to perfection!
- ✓ **Map Out Decision Makers at Target Accounts** - ABM is not easy. There is no silver bullet. It requires research, careful planning, and expert execution. Another research step is to map out the key decision makers in each of your target accounts. You need to be aware of who is involved in the decision-making process and what their concerns and priorities are. Some of this info you might glean from websites and publicly available information, while some accounts might be more difficult to map and will require investment in market intelligence tools like ZoomInfo and others.

- ✓ **Tailored Multichannel Case Studies** - Take the time to tweak your existing case studies in such a way that they can be made more personal to your target account decision-makers. The way you can do that is to go in and add or edit any parts of the case study that might be particularly relevant to your target account. You should also create different versions of your case studies for the various marketing channels available. If you can get a video from a client, that can be hugely valuable for your website or channels like YouTube, Instagram, Tik Tok, etc. Putting together graphics with customer quotes that would resonate with target accounts will be valuable for your slide decks and possibly too for targeted social media ads. Condensed case studies can also be used as part of a one-to-one email or email marketing campaigns.
- ✓ **Personalized Web Pages** - If you are linking back to your website as part of your outreach to target accounts, you don't necessarily want to lose that personal touch. In fact, you should ensure you don't link back to a page that provides a general value proposition about your product. Instead, develop personalized web pages that speak directly to your target accounts needs. Work with your team to figure out what this web journey will look like including what messaging to lead with and what additional materials or pages you will link to for the personalized web page.
- ✓ **E-Books** - Materials like e-books can still bring a lot of value in an ABM situation. An example could be where the ABM team puts together e-books that offer practical advice for each of the roles involved in the target account's decision-making process - e.g. The CIOs Guide to Secure AI Implementation or something to that effect. The way to tailor this ebook then would be to attach a foreword addressed to each CIO at each target account.
- ✓ **Video Messaging** - Tools like Loom can bring a lot of value to an ABM program and will allow sales reps to reach out directly to key decision-makers in a personalized way. Loom and others allow screen and camera recording so reps can leave video messages with stakeholders where they talk about and demonstrate the product in a highly personalized fashion and how it can solve the company's pain points.
- ✓ **Direct Mail** - Creativity, as we have said, is key. Don't be afraid to leverage some of the more traditional channels that might have less noise than other more modern options like social media. Direct mail can be a very effective way to get your message in front of an important decision maker. There are even tools that will integrate with marketing automation platforms like HubSpot where you can build an automated direct mail step into your outreach.





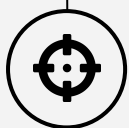
- ✓ **Targeted Online Ads** - PPC has an important role in ABM - particularly in the area of targeting and retargeting. LinkedIn allows you to run ads that target individual companies, while other software tools focused specifically on retargeting will help you stay in front of key decision-makers.
- ✓ **Account Slide Decks** - This tactic probably goes without saying, but slide decks will need to be personalized for each target account. Include things like updated graphics that include both your logo and your target company's logo. Have slides that speak to the priorities of each decision-maker involved with key high level points highlighted. Include slide versions of case studies that are tweaked to meet target company pain points.
- ✓ **Events** - Yes, events can still be included as part of an ABM initiative. If there is a separate event marketing team at your company, it is worth looping them into your ABM initiative. Events are a great chance to meet key target account decision-makers in person. Relationship building is another ABM fundamental and events give you the chance to build and nurture those key account relationships.
- ✓ **Newsletter** - Everyone and every company has a newsletter today - but that is not a reason to overlook this channel. In many ways, the popularity of newsletters is itself a manifestation of the growing desire for personalization in every communication. People are now happy to receive the newsletters that they desire into their inbox daily rather than going into google and searching for topics that interest them. The way ABM can utilize newsletters as a tactic is by creating personalized target account newsletters that can contain things like industry news, product updates, and thought leadership - all framed in such a way that it relates to the target account.
- ✓ **Offline Ads** - Again, no channel can be overlooked as you put your ABM playbook together. If a magazine or print ad will help you get seen by a target account decision maker, then you should consider incorporating it into your marketing mix. Some ABM campaigns have even gone so far as to buy up billboard ads that targeted a key decision-maker on their route to work. Whether or not you will need to go to that level of extreme is up to you, but the point is that sometimes it is the outside the box approach that will unlock key accounts.
- ✓ **Webinars** - There are a few different ways you can incorporate webinars into your ABM strategy. In a situation where you already have a relationship with a target account and you are looking to expand your business with them - you might invite your champion on to speak about a relevant industry topic, helping them boost their personal brand and benefiting your company by firstly demonstrating social proof of your product's success and secondly further embedding the image of the companies working together in a successful manner. In a situation where you are trying to land a new target account, you could run a webinar specifically for the target account with invites sent to all stakeholder and even supporting stakeholders. The webinar could be run as a Q and A session where you have put together a panel of experts from within your own company to speak and answer questions about issues that are high priority for the target account.

- ✓ **Email Marketing** - While email marketing might not always be associated with the level of personalization associated with ABM - it still does have a role to play. You can use marketing automation platforms like HubSpot and others to put together multi-step email campaigns that are targeted purely towards the target account. For added personalization, you can build multi-step campaigns for each target account stakeholder, tweaking the language and content for each campaign to relate it to the different stakeholder priorities.
- ✓ **SEO** - Are there some terms or search queries that are particularly relevant to your target account? It might be a low volume or long-tail search term that could be related to a particular priority or initiative taking place within the target company. Ranking organically here might not give you a huge boost in web traffic, but it could get you the targeted visitors you need to open doors at specific accounts.
- ✓ **PPC** - PPC can be used as an ABM tactic in a similar way to organic SEO. In fact, PPC can be an even better starting point, because it can be rolled out immediately and will let you test out your hypotheses. An example might be - your sales team has learned that a particular target account is unhappy with one of their software providers - a competitor - and is weighing up alternatives. The goal here would be to get your product in the mix. A quick way to rank here would be to bid on terms related to this software provider and alternatives to this software provider. The person who is conducting this search is a highly targeted visitor and getting them to your website can help you generate opportunities.
- ✓ **Podcasts** - You can tie podcasts into an ABM initiative in a number of ways. Similar to webinars, you could invite an existing customer on to talk over industry trends and pain points that would be relevant to target accounts. If, for example, you have a CIO at a customer account who you know is a big fan of your product, then you could invite the CIO onto your webinar with the dual carrot of boosting this person's personal brand and helping them show their company in a positive and professional light. This podcast could then, in turn, be shared with CIOs at target accounts who would have similar priorities and speak in the same CIO parlance. Another way to use podcasts would be to put forward your company's in-house industry expert to appear on industry podcasts that would include your target companies as listeners.
- ✓ **Sponsorships** - The first step here is figuring out which websites, magazines, podcasts, newsletters etc. your target decision-makers subscribe to or are most likely to subscribe to. If you are in the early stage of targeting an account and have not yet built up a relationship, then sponsoring one or some of these publications can be an effective tactic.
- ✓ **VIP Events** - Similar to sponsorships, running VIP events can help you build relationships with key decision-makers. An example might be an invite only dinner that you host around major business conferences like Dreamforce or HubSpot's Inbound event.

**This list - though long - is not exhaustive. In terms of ABM, there are any number of tactics you can use. Stay creative and open-minded throughout. ABM is a cross-functional effort that requires strategic thinking, close-knit cooperation, and also the flexibility to pounce on opportunities as they arise.**

# BUILDING YOUR ABM STRATEGY

Often it is a combination or one of the CMO or CRO who is tasked with overseeing the ABM strategy. Designing this blueprint for success is no mean feat and the initial planning and strategizing phase can make or break the initiative. Having already examined the tactics and various principles associated with ABM, we move onto the steps you should take when building your ABM strategy.



## 1. IDENTIFY TARGET ACCOUNTS

This initial step needs widespread agreement in the company - including the executive team. Work with heads of departments and other executives to finalize the list of accounts to target.



## 2. CONDUCT ROI ANALYSIS

Work out your average closed won deal size or potential average deal size with a target account and weigh it up against the costs involved in your ABM program including personnel time, systems, ad spend etc.



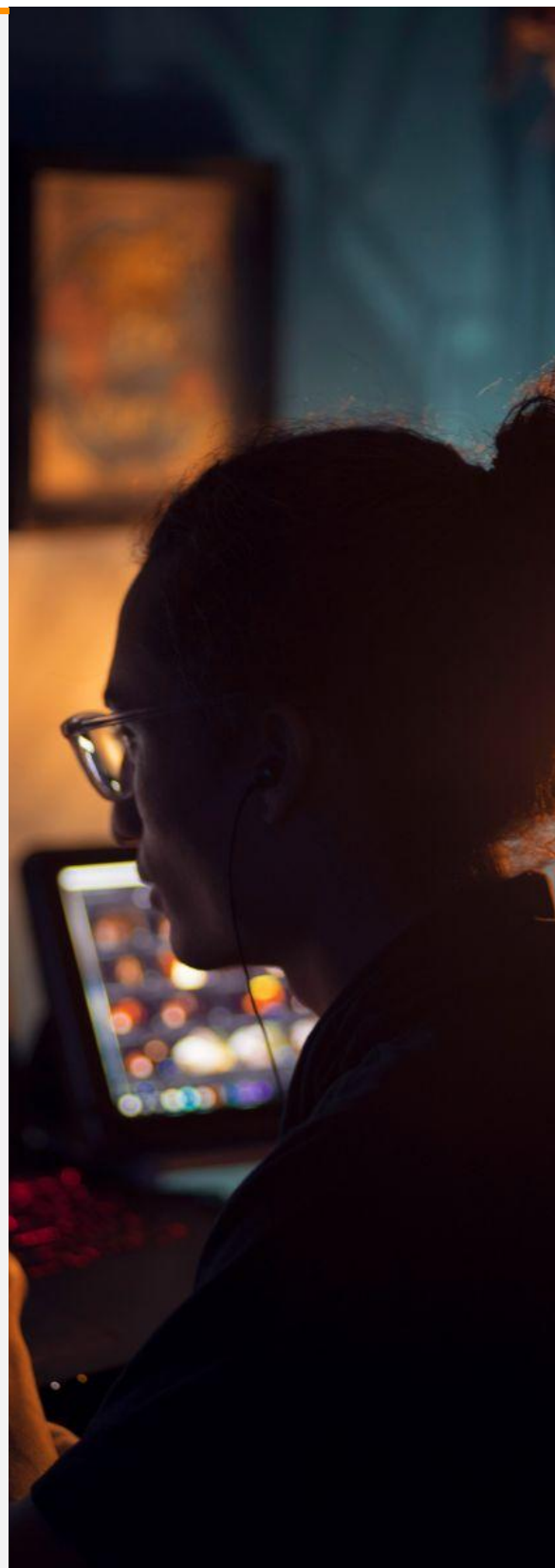
## 3. START SMALL

Hone in on a Small Number of Accounts Initially. For sales and marketing teams, ABM will be a new way of working. It will involve new processes, systems, workflows, and a whole new level of cooperation. Rolling out an ABM program is a considerable and widespread effort. One of the best ways to kickstart an ABM program is to roll it out on a much smaller scale in a pilot capacity. If you can pinpoint the accounts that could lead to quick wins - you will have the proof of concept you need to grow the ABM program.



## 4. GET EXECUTIVE SPONSORSHIP

For ABM to work as a strategy, you need to win support at the highest levels of the company. Communicating upwards is important here. Add ABM as an agenda item at the next executive meeting and even schedule time with key leaders - including the CEO - to communicate your ABM vision. Remember, it is the bottom line that the executive team will be focused on. Using your ROI analysis, you can build a case for ABM at your company.





## 5. BUILD YOUR ABM TEAM

Your ABM team will be a cross-functional selection of personnel that can apply their time or some of their time to targeting and winning some new business with select accounts. The initial ABM team should contain the following resources:

- **Heads of Sales, Marketing, and Business Development** - You will need these heads of departments as active participants - if not co-owners - of your ABM initiative.
- **Market Research Expert** - Who this person is could vary - perhaps it will be a marketing generalist or director, but the task is vital. Learn and relay to the team everything there is to know about your target account. They will also need to identify and map out the key stakeholders involved.
- **Content Expert** - ABM is powered by tailored content. You will need a highly skilled content expert to produce this content.
- **Business Development Rep** - You will need someone to relentlessly work whatever channel necessary to open the lines of communication.
- **SEO and PPC Expert** - This expertise is also vital. Getting in front of key stakeholders organically and in a paid capacity is another important part of the ABM jigsaw.
- **Data Analyst** - You will need someone to track all ABM activities and provide the level of reporting needed to demonstrate ROI and build momentum for the program.
- **Account Executives** - Possibly the most important member of your ABM team - the AE. This person has the skills, confidence, expertise, and know-how to close six and seven figure deals.

With these resources in place, you can move onto the next steps involved in rolling out your ABM program.





## 6. DESIGN YOUR ABM PLAN

At this stage, you will have your initial target accounts selected, built up executive level support, and put together an ABM squad to drive this program. The next step is laying out your plan. While it may vary, there are some general steps you can follow as a kind of ABM checklist while putting together your plan.

- **Research Target Accounts** - Learn everything there is to know. Who are the key people and what are their priorities? For public companies, check the investor relations section of their website for annual reports and quarterly earnings transcripts. For non-public target companies, trawl news sites, LinkedIn, social media, company websites, and any info you might already have internally on your CRM.
- **Map Out Key Decision-Makers** - Update your CRM with info on all key decision-makers and communicate it with the broader ABM team.
- **Develop Target Account Value Propositions** - Starting with your general value proposition, work out how you can tweak it so that it speaks to the needs of the target company. The next step is then working out how your product can benefit the lives of each key decision-maker. Once these value propositions have been developed, share them with the wider ABM team and also incorporate any feedback they might have. A live Google Doc with comments turned on can be a good way to centralize and keep the value propositions up to date. Remember, sales teams are the ones that are hearing feedback directly from customers and prospects. The insights a sales rep can share are vital.
- **Build Your ABM Content** - Now that you have your value propositions in place, you can use them to inform the tailored content that will resonate with your target account stakeholders. Work with your content resource to roll out all the various pieces of content you need. Everything from slide decks, case studies, web pages, marketing emails, etc. will be needed - and needed in multiple versions and formats.
- **Execute** - With your supporting ABM content in place, it is time to roll out your ABM program and start building relationships at your target companies. Your business development reps will be important here - working in tandem with the marketing team who will be running paid campaigns and other activities simultaneously to get the attention of the right people and start generating meetings.
- **Measure** - With your ABM dashboard in place, track the progress of your ABM program and assess for any weaknesses or shortcomings in your ABM pipeline. Are there any commonalities in closed won deals that can be doubled down on. Similarly, if there are common reasons behind deals being lost, investigate and address what needs to be done.



## **7. COMMUNICATE SMALL AND BIG WINS**

If you are running a pilot ABM program with a view to expanding it - then you need to communicate all small and big wins at this stage. This communication will help you build up the internal support you need to grow the program. Take any key metrics or stats you have - particularly around ROI - and share them widely.



## **8. GROW YOUR PROGRAM**

If you have successfully gotten this far, then it is time to grow your ABM program and expand the number of accounts you will target. Some considerations to keep in mind here are whether you want to stick with one-to-one ABM or scale the initiative in a programmatic way, using technology to scale into a one-to-many approach. There may also be additional software tools you will require - or at the very least, extra licenses on existing software tools. Additional budget must be considered and so too must the role of AI in your ABM program as it scales.



# B2B ABM METRICS



As is the case with any sales or marketing initiative, metrics and reporting will play a hugely important role. While it goes without saying that the ultimate ABM metric or data point is revenue, there are some very important metrics to track that can give you the insights you need to grow your ABM revenue. One example would be pipeline analysis - if you can pinpoint areas where your ABM pipeline is faltering, and, if you can address the issue, then you can potentially see a big rise in ABM revenue as a result.

The ABM metrics we have included in this section are not exhaustive by any means, but they are the metrics we have seen to deliver the most insights over the past 15+ years in the B2B environment. The metrics we will focus on are in the following categories:

- Engagement and Awareness Metrics
- Account Coverage and Penetration Metrics
- Pipeline and Conversion Metrics
- Revenue and Growth Metrics
- Retention and Satisfaction Metrics

## ENGAGEMENT AND AWARENESS METRICS

**Target Account Engagement Score:** Composite score showing how engaged target accounts are across channels (emails, ads, website, etc.).

Formula: Weighted sum of engagement activities (e.g., website visits, email clicks, ad impressions, event attendance).

**Account Engagement Rate:** Percentage of target accounts showing engagement within a given period.

Formula:  $(\text{Number of engaged accounts} \div \text{Total target accounts}) \times 100$

**Target Account Reach:** Measures how many of your target accounts have been reached with campaigns or content.

Formula:  $(\text{Number of accounts reached} \div \text{Total target accounts}) \times 100$

**Account Content Consumption:** Tracks how much content a target account's contacts consume (e.g., downloads, video views).

Formula: Total content interactions per account (sum or average per account).

**Key Engagement Trigger (Custom field in CRM):**

Identifies specific actions that indicate buying intent (e.g., demo request, pricing page visit).

Formula: Binary or timestamp field capturing trigger occurrence (1/0 or date).

**Key Engagement Trigger Detail:** Qualitative or quantitative detail describing the specific trigger event.

Formula: Logged event data (e.g., "Requested demo on Oct 3 via landing page").

**ACCOUNT COVERAGE AND PENETRATION METRICS**

**Account Coverage:** Degree to which key contacts/roles within target accounts are known and engaged.

Formula:  $(\text{Number of identified contacts} \div \text{Total desired contacts per account}) \times 100$

**Account Penetration:** Extent of engagement or relationships within a target account.

Formula:  $(\text{Number of engaged contacts} \div \text{Total contacts in account}) \times 100$

**PIPELINE AND CONVERSION METRICS**

**Number of Meetings Booked:** Measures sales meetings or demos scheduled with target accounts.

Formula: Count of qualified meetings booked per period.

**Opportunity Conversion Rate:** Percentage of engaged accounts or leads that convert into opportunities.

Formula:  $(\text{Number of opportunities created} \div \text{Engaged accounts}) \times 100$

**Stage Conversion Rates:** Measures the rate of movement between pipeline stages (e.g., SQL → Opportunity).

Formula:  $(\text{Number of deals moving to next stage} \div \text{Number of deals in previous stage}) \times 100$

**Sales Velocity:** Measures how fast deals move through the pipeline to close.

Formula:  $(\text{Number of deals} \times \text{Average deal size} \times \text{Win rate}) \div \text{Average sales cycle length}$

**Average Deal Size:** Average revenue per closed-won deal.

Formula:  $\text{Total revenue from deals} \div \text{Number of closed-won deals}$

**Content Association with Winning Deals:** Identifies which content types are most associated with closed-won opportunities.

Formula:  $(\text{Number of closed-won deals influenced by specific content} \div \text{Total closed-won deals}) \times 100$



## REVENUE AND GROWTH METRICS

**Upsell Metrics:** Tracks additional revenue generated from existing customers.

Formula:  $\text{Total upsell revenue} \div \text{Total existing customer revenue}$

**Upsell Rate:** Percentage of customers who purchase additional products/services.

Formula:  $(\text{Number of customers with upsells} \div \text{Total customers}) \times 100$

**Cross-Sell Rate:** Percentage of customers who buy products across multiple categories.

Formula:  $(\text{Number of cross-sell customers} \div \text{Total customers}) \times 100$

**Customer Lifetime Value (CLV):** Total projected revenue from a customer over their lifetime.

Formula:  $\text{Average purchase value} \times \text{Purchase frequency} \times \text{Customer lifespan}$

**Customer Acquisition Cost (CAC):** Average cost to acquire a new customer.

Formula:  $\text{Total sales \& marketing spend} \div \text{Number of new customers acquired}$

## RETENTION AND SATISFACTION METRICS

**Customer Churn:** Percentage of customers lost during a given time period.

Formula:  $(\text{Number of customers lost} \div \text{Total customers at start of period}) \times 100$

**Customer Satisfaction (Net Promoter Score - NPS):** Measures customer loyalty and likelihood to recommend.

Formula:  $\% \text{ Promoters (9-10)} - \% \text{ Detractors (0-6)}$

**Another more qualitative metric that you should consider is your company or product's appearances in analyst reports.** These reports will give you a valuable insight into how your company is being perceived in the market. Appearances in industry reports can also give you a good reason to reach out to target accounts and share a complimentary copy of the report with a key decision-maker.

The ABM metrics we have included here are not meant to be the only metrics you track - but, they will give you a very solid starting position. There may be some additional metrics that are particularly relevant to your company's product or service that you could also include.





## CLOSE

Thank you for downloading the MFS Guide to AGM - we hope you have found some value in our analysis and lessons we have learned over the past 15 years. If you are launching an ABM initiative or looking to take an existing program to the next level, then we wish you all the best with your next steps.

If you are looking for some additional ABM expertise or resources, please feel free to reach out and set up an initial conversation - we would be more than happy to hear from you and see if there is a way we can add value.



Email

[info@moveforwardstrategies.com](mailto:info@moveforwardstrategies.com)



Website

[moveforwardstrategies.com](http://moveforwardstrategies.com)