Lessons from ABM Leaders

Juniper, Microsoft, and Teradata
Lessons from ABM Leaders

Juniper, Microsoft, and Teradata

Donna Thach, ITSMA

The rapid rise of account-based marketing (ABM) in recent years has generated enormous business success, but also highlighted a myriad of organizational challenges as marketing leaders develop their programs. Three senior ABM veterans discuss lessons learned along the way.

Key takeaways

“Why ABM” is an essential first step. Educate the organization, set clear expectations, and define your strategy and program to make sure everyone is on the same page.

Finding, developing, and keeping the right marketers for ABM is a big challenge. Take the time with recruitment, invest in training, and define career paths to help people grow in their ABM roles.

Collaboration and trust with sales is critical. ABM marketers need to “speak” sales, understand the sales process, align with the sales team and their objectives, and include sales in the planning process.

Metrics matter! Aligning with sales is necessary but not sufficient. ABM should drive short-term results but also long-term change; the right metrics will vary by organization but need to cover a range of tactical and strategic objectives.
Lessons from ABM Leaders: Juniper, Microsoft, and Teradata

Few marketers these days will argue against the business case for ABM. It delivers higher ROI than all other types of B2B marketing programs, and high-growth companies prioritize ABM. But moving from concept to pilot to established program is no simple task, especially in large, complex organizations.

At ITSMA’s recent Marketing Leadership Forum, ITSMA Senior Associate Kathy Macchi led a panel discussion with three marketing leaders who have succeeded in implementing and scaling their ABM programs: David Armijo, Services Marketing Director, Microsoft Corporation, Raianne Reiss, Director, Americas Marketing, Juniper Networks, and Scott Sobers, Vice President, ABM and Americas Marketing, Teradata.

Getting Started

Raianne Reiss, Juniper Networks: About six years ago, our largest customer was undergoing a fundamental transformation and was planning to re-evaluate all of their vendors in the next one to two years. They came to us and basically said, “We don’t see a place for Juniper in our new strategy. We really like you and wanted to give you some time to figure out what you’re going to do.” That’s a tough conversation and it’s a critical issue when it’s your largest customer. We needed to find a way to correct the situation.

After an evaluation, we concluded that our vision, strategies, and solutions were completely aligned with the customer’s vision and strategy. We were just doing a poor job of communicating that alignment to the customer. To solve this, we launched an ABM pilot with the account to dedicate marketing resources who worked alongside the sales team. A year and a half later, the result was a massive turnaround. We not only secured a place in the new strategy, but we were the second vendor announced as a strategic partner.

ABM was so successful that we expanded the program to other accounts in that same vertical. We later added other accounts in that vertical in other regions around the world, and then to other verticals. Today, we continue to divert more resources from other areas of marketing into scaling our ABM program.

Right now, we have a three-tiered approach that looks like ITSMA’s model. We have Strategic ABM at the top with a limited group of our largest customers. The second tier is ABM Lite with several hundred accounts globally. And then we have Programmatic ABM, where we’re focused on about 5,000 accounts.

David Armijo, Microsoft: When I got the job three years ago to work with our field marketing organizations, I sought feedback right away from my sales colleagues and heard two main questions. First, how can we improve our relationship with sales? Second, how do we get more focused and create more impact? Our customers are bombarded with content, so sales and marketing need to work together to find a better way to engage them and provide a more holistic experience.
After listening to this feedback, we decided to do account-based marketing, which was an entirely new way to do marketing for us. Our organization was focused on scale and one-to-many events. We wanted to get better focused on our customers and their needs, which allowed us to transform a product marketing overview to a solution conversation with the customer in the center. ABM brings together the concept of understanding your customer and their imperatives with an improved focus on their opportunities to transform or provide positive impact to their business.

I thought everyone would agree and say, “This is great!” But no one did. Instead, there was a lot of resistance. You’re going to hear a lot of things like, “What? Why? How are we going to do this?” You need to be prepared for that. So I had to take the time to build the case for “why.”

We decided to go ahead with a Strategic ABM approach about two years ago, and it’s been a change management journey since then. Training has been critical. We brought in ITSMA for ABM training and certification. We’ve already certified about 15 people and are growing that program substantially.

Scott Sobers, Teradata: Our program started in July of last year. Like Juniper, we wanted to better align our resources and sharpen our focus on our key target accounts.

We started with a pilot of 12 accounts that we handpicked. At that time, our sales organization was taking a new approach to how they developed their account plans. This new approach included business outcomes-led, technology-enabled, focused points of view on how our capabilities can solve key business issues. Not only was the timing perfect, but so too was this new approach that enabled marketing to target key contacts within an account based upon business issues they were trying to solve.

So we teamed up with sales and launched our ABM pilot. This included aligning our marketing and sales teams by account and developing individual ABM marketing plans by account aligned to the new account plans and points of view.

We now have a two-tiered ABM model for our top 50 accounts. The top 25 have an account-based marketing director aligned by account. The second tier of accounts have a more programmatic or self-service model.

Outside of the ABM program, we have a very highly focused marketing approach for the accounts below the top 50. We only target who is in our target universe. While some may call it ABM because of the focus and tactics, we don’t call it ABM.

Growing Pains

Raianne Reiss, Juniper Networks: One of the toughest parts of scaling ABM was finding marketers with the right skills. ABM requires a different skillset that does not exist anywhere else in marketing. It took me nine months to find the right person for some positions. You need to make sure you have the right person for the job—someone who can “speak sales” and align with sales, understand what
Lessons from ABM Leaders: Juniper, Microsoft, and Teradata

sales is trying to achieve, and put the right plan in place to add value. Taking a traditional volume-based marketer and trying to turn them into an ABM resource is likely to fail.

I was also surprised to learn how high the burnout rate is. The burnout rate is about two to three years for an effective ABM marketer because they need to be continually challenged, and supporting one or a couple of accounts can be taxing over time. This is something you need to plan for through purposeful career path planning, account rotations, etc. Adding to the burnout rate is the fact that at Juniper, ABM marketers are responsible for everything with their accounts, from developing the marketing strategy and plan to execution. We have expected people to be both a strategist and a tactical executioner—which is difficult to attract and maintain.

We’re currently changing how we resource these positions. Senior ABM marketers tend to not feel challenged with the tactical execution and we don’t want to pay these high-level resources to do this work. So, we’re separating that execution work from the strategic planning work. Under the new structure, each ABM staff may support more accounts, but they’re doing different types of work that better align with their skill sets and ambitions. In theory, this should help with the burnout issues, as well.

Another significant challenge was the metrics. It took us at least two years to get the metrics right and we still continue to refine them. Our marketing organization, like most, was focused on things that are measured in volume, like number of leads, pipeline created, number of new contacts, and other metrics that don’t apply to ABM. The focus of ABM is very different and it’s not a volume game. In order for a pilot program to be successful or for a program to scale, you have to be measuring the right things in a way that everyone can understand and get on board with.

Scott Sobers, Teradata: Our entire marketing organization has a role to play in ABM. Whether it is our analyst relations team, our content team, reporting and insights, demand generation, digital team, and others. All are looking through the ABM lens to determine what they need to do to support our ABM strategy.

The team responsible for developing the ABM marketing plans is a combination of what we refer to as our “ABM team” and the “demand generation team”. The ABM team has responsibility for the ABM plan strategy and working directly with our sales team. This team has experience working closely with sales and was originally our industry marketing team. They were used to managing entire groups of industries and large-scale programs, so making the transition to ABM has been a learning experience for them, as well as the other teams. For example, one day you are executing an industry marketing plan for an industry covering, let’s say, 100 retail accounts, spanning thousands of contacts, and the next day you are developing plans focused on just one account where you may only target five contacts. This was a major change. Tactics, reporting and metrics, funding, processes...everything changed.
Additionally, don’t underestimate the need to set expectations upfront with the field sales teams and your executive leadership team on what to expect from ABM, so everyone is on the same page.

**David Armijo, Microsoft:** You can never underestimate the people side of it. Be very focused on where you want to apply it, because it’s not for everyone and it won’t work everywhere. Some members of our team left, because they preferred to do broad-based marketing. But new people came in and embraced the concept of customer engagement and one-on-one marketing with sales.

It will be a transformational activity for your team and you will need to help them in this journey. Additionally, be very focused to ensure you have the right balance of people and expectations, because it’s easy to overstretch a very small team.

**What’s Next**

**Scott Sobers, Teradata:** First, we have expanded our team and grown our program. In terms of scaling, we went from 12 to 50 accounts since the official launch. We will focus on these 50 for the remainder of the year.

Next, we’re revising our ABM metrics based upon what we learned in the pilot. In a typical demand generation—i.e., non-ABM—campaign, you may be tracking thousands or millions of responses or engagements. In ABM, you need to have the processes and tools in place to capture a single meeting or engagement. For example, if a salesperson meets with an executive as a result of an ABM tactic, do you have the process in place to ensure the sales executive logs this meeting? For ABM, it is about micro reporting.

We are also testing different insight reporting tools and intent-based data sources, as well as defining our ABM social strategy.

We are constantly refining our approach.

**David Armijo, Microsoft:** We have two priorities at the moment. First, we want to mainstream some of the things we have done with our strategic ABM program. Our pilot program was a success; we have the metrics people like and it’s now going out to the wider organization.

A larger scale programmatic ABM program is being put in place for our product-based campaigns. I have the opportunity to lead the next phase of it, so we’re going to double down and reallocate our resources for that.

We’re also going to educate our resources and get them ready for the next phase of ABM. For example, we’re going to put our marketers through our Digital Academy, which is a week program that we run for people providing digital marketing services for our top accounts. That’s a huge investment. We’re not trying to make them business consultants; we just want to make them better connected with our
customers and their businesses, so they have that knowledge. It’s about scaling up the readiness and capability of the individuals and investing in them to get them ready.

**Raianne Reiss, Juniper Networks:** After six years, we’re doing a good job with Strategic ABM. The question now is how to move accounts up the ABM triangle. This involves growing our Programmatic ABM efforts at the bottom of the pyramid, with the intent to grow them into the next ABM Lite account, and to ultimately become the next Strategic ABM account.

Currently, our priority is strengthening ABM Lite and the programmatic layers, so we can resource correctly for the right accounts. Another top priority for us is leveraging the tools and technologies to bring better insights into our ABM program. We started with very manual processes. For example, we tracked customer engagements on spreadsheets. We’re trying to integrate the technologies to automate reporting and leverage digital insights to capitalize on opportunities more quickly.

**Essential Tools and Technology**

**David Armijo, Microsoft:** We rely heavily on LinkedIn. There’s a wealth of knowledge in LinkedIn and other communities that are underutilized. We’re learning how to use the technology more effectively. We use LinkedIn’s Sales Navigator to become more targeted and to drive communities as part of our thought leadership engagement strategy. We’re also getting our Solution Managers to become more LinkedIn-enabled.

Everyone at Microsoft uses the same planning tool, so we can map those digital conversations from a product campaign into what we’re doing with digital transformation for specific accounts. It gives us insights and touchpoints so we can see where and how customers are engaging.

We also have a proprietary tool on budgeting. Having this tool allows us to get a better picture on where we’re spending and how we can better utilize that money to focus on our plans.

**Raianne Reiss, Juniper Networks:** I’m a tech geek at heart, but the number of ABM tools out there is overwhelming. I’m still waiting for the tool that helps us target individuals within an account. With ABM, we don’t need to target everyone in a building or everyone in a company. We need to reach specific people along their personal digital journey with the right content at the right time.

Recently at Juniper, we have been doing a lot of work to develop a data lake. We’re putting all our insights from multiple sources into this data lake. We developed proprietary tools to mine that data. The idea is to provide a true account overview of what’s happening with an account based on all the insights in that lake. This will allow us to identify opportunities faster and invest our resources to capitalize on these opportunities.
Scott Sobers, Teradata: For me, it’s the telephone. There are plenty of new tools and we’re trying something new each month, but the most comforting thing to me is to be able to pick up the phone and call someone—for example, the sales team to get their feedback on our program and approach. It’s that qualitative factor. When you’re so focused on an account or a handful of people, the numbers don’t tell the whole story about what’s going on. You need to get those insights directly from the sales team, and the telephone allows you to talk directly to them. There’s a human factor that cannot be eliminated.

Balancing Other Aspects of Marketing with ABM

Raianne Reiss, Juniper Networks: Everyone has limited resources and funding, and deciding to implement an ABM program will be no exception. You’ll likely need to make a concerted decision to stop doing some activities to invest in an ABM pilot. As you go along, other trade-offs will be necessary to scale. You’ll also find that the ROI on ABM is so much higher compared to other marketing activities that you will be able to easily justify the increased investments. The hard part is figuring out which activities you are going to stop doing in order to make those investments.

Scott Sobers, Teradata: Our ABM approach enables the ABM team to tap into all of our marketing resources. For example, if we want to personalize the messaging on teradata.com for a particular account, we can tap into the Teradata digital marketing team to do that.

Our strategy is, as we say, to meet the customer and the sales team where they are. Some customers may need to be targeted with a digital campaign, while others just need custom content tailored for an account or contact. Some may need custom messaging, or a tailored event.

We’ve built the model for our top ABM accounts to have a highly bespoke approach supported by a basket of marketing deliverables that we have committed to sales that we can deliver on. Our ABM marketers select what they need based upon the plan and strategy they developed by account. If there’s something else they need, we are very open to testing new tactics.

David Armijo, Microsoft: We started ABM as a highly focused program for a select number of customers. As an organization, there has been a lot of change, so as part of that evolution, we hope to create a thread between our ABM program and our broad-based programs.

We’re looking at how we can connect our broad-based programs on digital transformation to leverage the investments we have made to be more customer centric, or to have executive-engaged conversations around what we’re doing. By making that connection, we can have both. We’re still doing ABM with a separate group of people. We’re growing the number of ABM-ers and capabilities and expanding the number of customers.
Final Thoughts

**Scott Sobers, Teradata:** First, find someone who has done this before. You will need guidance along the way—find your Sherpa. Everyone defines ABM differently, so you need to tailor it for your organization, and showing progress early is essential. Next, make sure sales is in the foxhole with you. You need to have agreement on the plan, approach, and who is responsible for what…it’s a true partnership.

Third, start with a handful of accounts so you can really focus on what works, what doesn’t work, and have the ability to identify gaps in your processes and technology before you try to scale. For us, we’ve grown from 12 to 50 accounts. We have learned a lot along the way. Our next challenge is improving operational efficiency. When you scale, you’ll find those little hairline cracks, exposing gaps in your strategy.

**Raianne Reiss, Juniper Networks:** It boils down to three things for me. First, you have to pick the right accounts and sales teams who are hungry for support and willing to work with you as one team. Second, pick the right marketers with the right skillsets who can speak sales, understand their objectives, and add value to the team. Third, do some research on best practices for ABM metrics. If you don’t measure the right things early, you’ll risk failure of the pilot program and it will impact your ability to scale.

**David Armijo, Microsoft:** Buy the book *A Practitioner’s Guide to ABM*. I wish I had that book two years ago. The forward in the book should say, “Build an alliance.” Get people on board early with your ideas. Make sure there’s a clear “why” and ensure that people are connected with why.

About the Panelists

**David Armijo**
Services Marketing Director, Microsoft

David Armijo leads Microsoft’s Worldwide Services Marketing team in campaign execution and field marketing operations. He specializes in business solutions for enterprise and industry. He currently leads the account-based marketing for enterprise solutions for global accounts. David has extensive background in cloud computing solutions for customer management business intelligence, and knowledge management. He works directly with Microsoft’s product groups in definition of field sales and marketing programs.

**Raianne Reiss**
Director, Americas Marketing, Juniper Networks
@RaianneR

Raianne Reiss is a Director of Americas Marketing at Juniper Networks, where she is responsible for driving relevancy, demand, and loyalty with customers and partners in North and South America. Raianne has spent her career in the technology industry in a variety of senior sales and marketing leadership roles with global responsibilities. As a recent winner of the “Challenger Award”, she is passionate about driving innovation in marketing and is a frequent industry speaker on the topic of account-based marketing.
Scott Sobers
VP, ABM and Americas Marketing, Teradata Corporation
@ssobers

Scott Sobers is the VP, ABM and Americas Marketing at Teradata. As part of this role, Scott is responsible for Teradata’s strategy and execution of their account-based marketing program. He brings a wealth of leadership and marketing experience to the role of VP of Marketing. His experience in global marketing, branding, and communications spans over 20 years, and includes both business-to-business and business-to-consumer marketing, managing all aspects of marketing for large enterprises and advising startups.

For More Information
Browse all ITSMA publications at http://www.itsma.com/online-library/.

About ITSMA
For more than 20 years, ITSMA has led the way in defining, building, and inspiring excellence in B2B marketing. With a dedicated focus on services and solutions for the connected economy, we provide our member community with insight, advice, and hands-on help to strengthen reputation, increase revenue, and deepen customer relationships. Learn more at www.itsma.com.

ITSMA Viewpoints are available at no charge to anyone from an ITSMA member company and for sale to others. Learn more about the benefits of membership at www.itsma.com/membership/.