ITSM Case Study

Scaling ABM

A New Approach at Fujitsu
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In the quest to successfully scale an ABM program, Fujitsu UK & Ireland has shown that judicious account selection, creative staffing, a shared toolkit, and a well-conceived program of training and support are critical to getting it right.

Key takeaways

ABM is the natural marketing strategy to support a business focused on growing revenue in large accounts.

Selecting accounts should be a collaborative effort between marketing and the business units, one that evaluates both medium-term business opportunity and the ability of marketing and sales to work effectively together.

Good ABMers can come from anywhere in marketing. While having the right set of marketing skills is table stakes, attitude and enthusiasm for the job set good ABMers apart.
Training, communication, and toolkits are essential foundations to support scaling up an ABM program.

Sometimes less is more: Doing a more effective job on fewer ABM accounts is likely to generate better results.

What do you do when your company’s business strategy changes to prioritize gaining more business with existing customers and challenges you to change your marketing strategy accordingly? For Andrea Clatworthy, head of client marketing at Fujitsu, there was an easy answer. Having piloted Account-Based Marketing (ABM) with three accounts with great results in parts of the business already, the best answer was to rapidly increase the scale of this customer-focused marketing strategy.

“We welcomed the request to do something different with open arms, as we knew we’d wasted significant amounts of money in previous years generating ‘sales-accepted leads’ that went nowhere,” explains Clatworthy. But Clatworthy knew that there would also be significant challenges in scaling up the ABM program from a pilot to the centerpiece of the team’s marketing plan. Finding the staff, identifying the accounts, developing templates, and providing adequate support for a widely expanded program all figured prominently in Clatworthy’s list of issues to address. And while the business was setting the direction, she still needed to convince them that ABM was the vehicle to achieve the company’s goals.

To get the business to buy into a wider ABM program, Clatworthy evangelized the approach, shared the results achieved by other companies, provided benchmarking data from ITSMA, and created a new marketing strategy that illustrated how the money they’d been wasting on lead generation could be invested more wisely in ABM. This new approach was communicated during the company’s three-year planning process and positioned as the natural bridge between the business strategy and the marketing strategy.

Clatworthy enthuses, “I wanted to achieve customer intimacy. I wanted to reduce our sales cycle time. And I wanted to increase revenue.”

Designing the Program

Identifying ABM Accounts

“We worked with the business to identify customers and targets for ABM where there was real potential or we could see potential in the next 18 months to two years,” explains Clatworthy. “We started with two lists: we had the list from the business and we had the list from marketing, and there were some commonalities. Then it was a discussion to develop the ABM list. We discussed the accounts at line-of-business level and then agreed on them at business-unit director level. The criteria we used included:
• Size of wallet
• Share of wallet
• The amount of change going on in the account
• Whether Fujitsu could add some value
• Whether marketing could work with the account team

“This analysis generated a final list of 58 accounts in the UK and Ireland for the financial year starting April 2014, including a select few target customers.”

Building the Right ABM Framework

Clatworthy consulted with ITSMA to refine the ABM process used in pilots and build a strategy for scaling the process. “We sat down and we designed an ABM training program for our marketers. Through that process we designed the Account-Based Marketing plan template. That drove the type of thinking that I wanted the ABMers to go through.”

Clatworthy was clear that she didn’t want to get to a point where Fujitsu just had a whole load of people doing tailored communications, because as she puts it, “that’s not Account-Based Marketing. I wanted marketing to be the driving force behind understanding the customer so that we could take the right message to the right people at the right time. At no point are we going to include people in a generic campaign because that doesn’t make sense. We want to develop ideas and create campaigns for an account that recognize their needs and demonstrate we are responding to those needs.”

The team did, however, make prodigious use of existing corporate programs within their ABM plans. The emphasis was on specifically tailored sets of engagements and communications that leveraged pre-existing corporate activities, whether publications, like iCIO magazine, or events. One important example is Fujitsu’s Executive Discussion Evening (EDE) series, which encompasses a number of events throughout the year on varying topics with high-profile speakers. The events offer an opportunity for key stakeholders in customer accounts to participate in substantive discussions with outside experts, Fujitsu executives, and each other.

For the ABM team, the “ABM skill,” as Clatworthy calls it, was in identifying the specific events and topics that would be of most interest to their accounts and intelligently incorporating those into the broader ABM plan. They focused on positioning individual events with their accounts so that customers were primed and motivated to attend.

The result was not only more effective engagement with ABM accounts but also improved performance of the corporate programs. Where the EDE program, for example, previously had targets for number of attendees from various industry sectors, there are now targets for number of attendees from ABM accounts. All of those targets, for EDEs and other corporate programs, have been achieved.
An Unusual Approach to Staffing

To manage such rapid growth in the number of ABM accounts, Clatworthy had to be creative in her approach to staffing—she didn’t have the luxury of hiring experienced ABMers from outside. Instead, she decided that everyone in marketing would become part of the ABM team. She asked that everyone not already involved in ABM devote 10-20% of their work day to it.

The decision to make everyone in marketing part of the ABM program was a carefully considered one. For Clatworthy, it was fundamental that all marketers have firsthand knowledge of how ABM works since it would help them to improve their performance during the 80-90% of their day not devoted to ABM. “That way, people could change how they delivered their day job to align better with ABM because they really understand it,” she says.

She concedes that having a full-time ABM team would have been more effective, but that was never really an option. The only sustainable way forward was creating a big team of part-time ABMers. The benefit of her approach is that now everyone in marketing, regardless of their role, can contribute positively to ABM. It was partly a question of shifting the effort of the whole marketing team from one approach to the other, but even more about changing everyone’s mindset.

In return for the full marketing team’s commitment, Clatworthy provided a specially tailored training program, a buddy system, an ABM portal, and periodic ABM drop-in clinics.

Training the Entire Marketing Team

All marketing staff participated in a two-day ABM training program from ITSMA. Over the course of the two days, they practiced on live account plans, shared available resources, and agreed on metrics for the ABM activities. They also collaborated to refine the Fujitsu ABM plan template. For Clatworthy, this was critical: “That drove the type of thinking that I wanted the ABMers to go through and enabled them to design the right kind of plan for their accounts, but on a consistent basis.”

Running a Buddy System

Once everyone in the marketing community had been trained in ABM and assigned to an account, Clatworthy launched a buddy system. Industry marketers took the lead, acting as buddies to everyone else who was now working on ABM accounts. Since these buddies already had both sector expertise and experience in ABM, they were able to help the new ABMers by sharing knowledge around business drivers and trends in the industry—helpful background for all accounts in that industry. Buddies ran periodic reviews of ABM plans and led the design of sector campaigns that were relevant for all of the ABM accounts in their industries.
Buddy groups were the main source of day-to-day support and guidance. They started out with fortnightly one-hour calls to check progress, tackle any issues, and share ideas. These calls gradually decreased in frequency as everyone gained experience and confidence; now they happen on a monthly basis.

**Creating Standard Tools and Templates**

In addition to training and buddies, all of the newly minted ABM staff had access to an ABM portal containing how-to guides, workshop and plan templates, and examples of previously created assets. This, as well as use of an internal social media chatter function, ensures that any reinvention work is limited and good practices are replicated.

**Support Through ABM Clinics**

The final element of staff support came in the form of ABM clinics that provided easy access to expert advice on all manner of ABM topics. Led by Clatworthy and industry marketing lead Natalie Field, these half- to full days spent in offices around the country offered all ABM staff informal access to Fujitsu’s most experienced ABMers on a drop-in basis. The ABM clinics also proved a clear and powerful demonstration of senior management’s support for, and participation in, this new marketing strategy.

**Keeping the Team on the Bandwagon**

Getting everyone in the marketing community to become an ABMer was an extremely ambitious task, but Clatworthy has produced impressive results. Nevertheless, there were the inevitable defectors. Three staff members immediately self-selected out of the program—they knew it wasn’t for them—but this came as no great surprise to Clatworthy. By the end of the year, four more people had opted out. Remarkably, out of 58 marketers, 51 have stuck with the ABM program.

**Program Governance**

Critical parts of Clatworthy’s approach to scaling the ABM program were a clear set of required templates and milestones for each account. The first step was a deep dive into each account, led by the ABMers with the account team. Armed with a template and some training on how to conduct these sessions, ABMers used got the necessary background and account information to start building their plans.

Plans were due at the end of the first quarter. They were reviewed first by the appropriate buddy and then by Clatworthy before going to the account manager for sign-off. Once the account manager was happy, Clatworthy had ultimate sign-off on the plan. This allowed both marketing and sales to contribute to the plan and accept it.

Plans were reviewed quarterly thereafter. The fourth quarter review looked at the experience and results of the previous 12 months, lessons learned, and initial thoughts for the year to come. All of these reviews were publicly available to sales and marketing on a SharePoint site for review, ensuring transparency on all sides.
A New Innovation: The Transfer Window

Halfway through the year, the newly expanded ABM strategy was getting good traction with account teams and business units. Clatworthy’s next challenge was that some business units were asking for more ABM and others wanted to swap accounts. To respond to these demands, Clatworthy borrowed from professional sports: she instituted a transfer window.

The rules were extremely strict, and with good reason. For one, said Clatworthy, “I was really clear that ABM is not about swapping accounts all the time. That’s called deal-based marketing, for a particular opportunity.” This is especially important because it takes time for ABMers to get up to speed on new accounts. Said Clatworthy, “If you think about it, for the first two to three months as an ABMer you’re learning about your customer and you’re doing your planning.”

Nevertheless, she wanted to be able to address the rare instances where there had been a genuine mistake or a major change in the account since selection, which meant that ABM resources were being squandered on an account that wasn’t going anywhere. Likewise, if the business unit decided that a much bigger prize emerged that wasn’t part of the ABM program, it should be allowed to drop another account in favor of that one.

With all of that in mind, she put these rules in place:

- There is only one transfer window per year for the whole program.
- You can’t swap all of your accounts.
- Any swap must be based on discussion and agreement between the business unit manager and Clatworthy.

The transfer window concept proved a workable idea. It helped to keep the account teams and business units on board and, in the end, only 2 accounts out of 58 were swapped the first year, resulting in only a small impact on the ABM team.

Funding

The expanded ABM program benefitted from a pragmatic approach to funding ABM activities. For healthy customer accounts that the business had already deemed strategic prior to the program, the business unit paid for any incremental costs incurred by the ABM program. For accounts that were not funded by the business unit, Clatworthy had a dedicated amount of marketing budget. To access this budget, ABMers had to go through an application process that involved confirming that the activity was in the ABM plan and completing a light business case, for which a template was developed.

To Clatworthy’s surprise, this budget was not exhausted before the end of the year. As it turned out, “A lot of the activity we executed was around making better use of corporate programs, tailoring the messaging, and adding wraparound activities.” The
things that made this ABM program so effective—understanding the needs and priorities of individual accounts and addressing them accordingly—didn’t necessarily require any significant additional investment to make them work.

**Continuous Improvement and Engagement**

An issue that has been particularly important to Clatworthy is keeping all the marketing community engaged. Two tools have helped her do this. One is an ABMer-of-the-month program, which recognizes the great work of individuals and highlights their achievements.

The other is actively soliciting feedback from the ABM team. To do this, Clatworthy has employed a stop/start/continue construct that she first took the team through at the end of the third quarter. This approach not only reinforces the fact that the ABM team is shaping the direction of the program but also provides crucial input to continuously improve the program itself.

**Leveraging Core Marketing Skills**

In addition to working closely with the corporate marketing programs and events, ABM has pulled heavily on many of the central marketing functions at Fujitsu. For example, the ABMers worked closely with the market intelligence team to produce annual reports for each ABM customer. With input from market intelligence on key industry and technology trends, and insights from the ABMer on specific customer engagements and customer priorities, the resulting output provides a summary (indeed, almost a case study) of what Fujitsu has done for the customer in the last year and some forward-thinking about future issues and opportunities.

In collaboration with the digital team, these annual reports have been published in a sleek e-book template that looks impressive and is easy to deliver. The digital team has also adapted some of its social listening activity to track important activity at an account level and share it with the appropriate ABMer.

**Early Wins**

The results Clatworthy and her team have generated so far include several notable wins, showing that they are making a significant impact on the business.

**Re-engaging an Existing Customer**

One case in point is with Heathrow Airport. Although apparently satisfied with the service Fujitsu delivered, Heathrow was not engaging. Key contacts there had unsubscribed from all of Fujitsu’s communications, stopped attending events, and genuinely appeared uninterested in anything beyond the existing service.

The ABMer on this account—“a really good ABMer; things don’t happen without a good ABMer”—started gathering information. They tried to understand what was going on
with Heathrow, its business environment, its challenges, and its competitive environment. The ABMer realized that Heathrow was competing with Gatwick Airport for a new runway and that there was a potential opportunity to help Heathrow showcase some of the work it was doing to make itself more attractive in its marketplace.

The key to doing this was advocacy. The ABMer worked with the account team to start an advocacy journey, including a case study, a video case study, and a PR tour (Figure 1). By helping Heathrow raise its profile, the Fujitsu team raised its own profile within Heathrow. The results have been hugely positive. The customer has re-engaged and has awarded Fujitsu significant additional business. As Clatworthy points out, “Just by understanding what was going on in their world, we were able to re-energize this customer.”

**Figure 1. ABM Advocacy Program at Heathrow**

**ABM at Heathrow**

**Previous situation:** Customer not engaging, unsubscribed from mailings, etc.

**ABM Objective:** Create meaningful relationships and enable re-engagement

**Strategy:** Focus on the CIO and find ways to tell his story—create an advocate

**Tactic 1:** Personal engagement of ABM to the CIO

**Tactic 2:** Run a PR tour at T2 to showcase the great job the CIO has done

**Tactic 3:** Thought leadership interview in iCIO magazine (Fujitsu media)

**Tactic 4:** Written and video case studies

**Outcome:** 19 pieces of press coverage; a great article in iCIO written & video case studies; mailings requested by the customer to be switched back on. CIO an advocate.

“The joint marketing went really well and supports HAL’s desire to be more ‘in the press’ so we have had positive discussions around this with senior client representatives”

Fujitsu Account Director

Source: Fujitsu UK & Ireland, 2015
Gaining a New Customer

The team at Fujitsu has found that there is a very strong correlation between showcasing its capabilities during an innovation session and winning significant deals. The challenge, of course, is getting a foot in the door to schedule an innovation session, particularly with a new account. That’s where, in the case of an identified prospect in the utility sector, the ABM team came in.

A very proactive ABMer on this account worked closely with the account director to understand the prospect’s business issues and priorities well enough that they were able to get the message across that Fujitsu understood the utility company’s challenges and to demonstrate how and where they could help. After months of effort, the utility company invited the Fujitsu team to come to its headquarters to deliver an innovation workshop. As a result, Fujitsu is now working on a multimillion-dollar engagement with the company.

Results and Lessons Learned

The ABM program’s performance is tracked broadly under three areas: reputation, relationships, and revenue, though marketing does not have a hard target in the latter. Although Clatworthy wouldn’t discuss the revenue impact in any detail, the revenue results have been strong enough that the business units have clamored for even more ABM.

On the relationship front, Clatworthy will eventually have the results of the company’s regular “voice of the customer” program to offer a hard measure, but in the meantime, she tracks many proxy data points. For example, one characteristic of a good customer relationship is that individuals reply quickly to an invitation, even if they can’t attend. “If they don’t respond at all, then you don’t have a relationship with them,” she says.

The one area in which Clatworthy concedes further improvement is needed is in reputation, specifically, the customer advocacy journey that she defined at the start of the program. “It’s really difficult to measure this, so I put in some hard measures on making sure we had what we call a reference summary updated for every ABM customer, where they were an existing customer within the year.” This document normally forms the basis for a case study, though there are some customers who will never approve a public case study. Although the ABM team didn’t manage to completely hit the target in the first year, it did succeed in creating updated reference summaries for 86% of their ABM accounts. Clatworthy doesn’t plan to let up on the target, either; it remains at 100% for the 2015–2016 financial year and is higher up on the priority list.

Tellingly, the impact of Fujitsu’s ABM program hasn’t been lost on marketing’s two recent industrial placement students (university student interns). Both have decided to write their undergraduate dissertations on the business impact ABM can deliver, having seen it firsthand.
Lessons Learned

For all of the success that Fujitsu’s expanded ABM program has generated, there have also been a number of lessons learned along the way. These are what Clatworthy considers the most important:

- **Get buy-in early on** from the business, sales and account management, and delivery communities—and engage with them at the right level. Although Clatworthy had done a thorough job of gaining the support of the senior executives, she didn’t initially plan anything to help educate the sales and business development teams. As a result, she and her team ended up putting a great deal of effort into educating these groups along the way. “If I could do it again, I’d do it differently,” she says. Her advice is to run sales education programs from the start.

- **Select accounts carefully.** Evaluate potential opportunity over 18 to 24 months, not just 3 to 6, and make sure there is good potential to work well with the account team. The business opportunity has to be there, but so does the compatibility between the marketing and sales teams.

- **Integrate with the account planning process** and work closely with the account team. Where no account plan existed, the ABM plan became the document everyone worked to. The biggest challenge in most accounts was creating a plan that would support opportunities but not put marketing on the line for actually closing them, since that job belongs to sales.

- **Get every marketer properly trained in ABM.** Even if individuals decide not to go ahead, they at least understand what the ABM team is trying to do.

- **Provide ABM refresher training throughout the year.** Clatworthy wishes she had had planned a one-day ABM refresher for the marketing team in the third quarter. “Some of the stuff you teach people at the start of the process they’re not actually starting to use it until three to six months in, so you need to remind them,” she says.

- **Be clear on what makes a really good ABM.** Attitude, enthusiasm, and a willingness to interact directly with customers are all essential. Having the appropriate mix of marketing skills is table stakes, but great ABMers understand that customers are people, not a theoretical concept.

- **Do fewer accounts, better.** Clatworthy is adamant that quality trumps quantity in ABM, so she has dramatically scaled back the number of ABM accounts in the region from 58 to 36 in the 2015-2016 financial year.

- **Innovation workshops are a powerful way of driving opportunities.** For new accounts in particular, ABM is a powerful way to get prospects to the point of engaging in one of these workshops.

- **Be clear about the difference between deal-based marketing and ABM.** Some accounts initially selected for ABM had major bids running, so the effort was focused on supporting those opportunities rather than the full ABM process. Once these deals have concluded, Clatworthy and her team are looking forward to expanding the scope of marketing efforts to build on the successful bid marketing done to date.
Next Steps
Perhaps the most counter-intuitive result of Fujitsu’s successful expansion of its ABM program in the UK and Ireland is that it is scaling back in its second financial year. Clatworthy explains, “The business asked us to do more accounts this year. But I was very clear, based on feedback from the ABM community and my personal take on it, that we should be doing fewer accounts but doing them better.” The result is that after attempting ABM on 58 accounts last year, Clatworthy and her team have pared that down to 36 this financial year. That gives the team of 51 ABMers the opportunity to double up on many of those accounts.

Internationally, however, the ABM program at Fujitsu is continuing to expand. Clatworthy has been asked to roll out the program across Europe, the Middle East, and Africa (EMEA) as part of the company’s Top 100 program. She has trained the assigned ABMers on each account, as well as the account team, in addition to providing them ongoing support. Clatworthy has just submitted a business case for developing a dedicated ABM team in Europe to work with country marketers to deliver ABM.

And ABM in Fujitsu isn’t going to stop there. The Global Customer Engagement Programme (GCEP) now has an element of ABM in it as well: teams can ask for support from what has developed into Fujitsu’s ABM Centre of Excellence (CoE) in the UK. So far, Australia and the United States have been the early movers in capitalizing on this opportunity.

Things are definitely looking good for ABM in Fujitsu. The future is also looking bright for Clatworthy. She’s off to Monaco with the top salespeople in EMEA who have been recognized in the annual sales incentive program. Duncan Tait, corporate executive officer, EVP, and head of EMEIA at Fujitsu, nominated her for the significant impact the ABM program has had on business results. As indicators of success go, she’s hit the jackpot.

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