Marketing

The 5 Stages of Account-Based Experience

How to Win Them All

zoominfo

Introduction

Savvy B2B marketers know that account-based experience (ABX) is the key to standing out and achieving success. ABX — which builds on the foundation of account-based marketing — is the result of sales and marketing teams working together to create a fully realized, collaborative go-to-market strategy. But for many, the promise of ABX is unfulfilled.

Why? A properly planned and executed ABX campaign can be resource intensive, and marketers across the board are being asked to do more with less. Without accurate B2B data and high-quality buying signals, proving ROI can be too difficult.

ZoomInfo rewrites that story by giving go-to-market teams an ABX platform built with the world's best B2B data, an unparalleled array of buying signals, a simple interface, and the power of our AI-fueled ZoomInfo Copilot.

The result: sales and marketing are aligned to deliver results and value at every step of your ABX strategy. Let's take a look at the difference strong data can make at each stage of your ABX program.

Define

Before you identify your list of target accounts, you first have to understand which buyers would be good fits for your product or service and which companies would be a waste of time and money. Start by defining your ideal customer profile (ICP): Work with sales leadership, go-to-market teams, and product experts to determine the firmographic criteria that constitute your ideal customer.

To help identify those qualities, review your existing customer data. Pinpoint customers with the highest annual contract value — especially long-term customers who have renewed — and find commonalities among them, such as industry, location, headcount, tech stack, and revenue. The more granular you get, the stronger your ICP will be.

Make sure to take customer lifetime value (CLTV) into account, too. This will help you identify your target audience (in Stage 2) that is most likely to create value in the long term.

Win-loss data as well to find commonalities among the accounts that convert — and the ones that don't, so you know who to avoid. ZoomInfo's Account Fit Score uses an AI model that looks back on your win-loss data to identify best fit account lookalikes.

"Even if you already have an ICP, it's crucial to review and confirm," says Rachael Foster, director of ABM at ZoomInfo. "You need to double-check it and challenge it to ensure that everyone agrees. This is a key piece of the puzzle that can't be missing from your strategy."

Next, define specific attributes that make for a good fit or bad fit. This will inform how you prioritize and make sure that you're investing in the right accounts.

🛢 The Data Difference

ZoomInfo Marketing provides unparalleled business data to create ideal customer profiles that will set up your ABX strategy for success. With over 300 data points and attributes on each company profile that reveal insights you won't find anywhere else, you can identify the specific qualities that your most important customers share to target (and convert) companies of equal caliber. You can also use these insights to identify companies that are a bad fit, which is equally important.

Identify

Once your ICP is set, it's time to nail down your list of accounts and, more importantly, the buying group and key decision-makers within those accounts. Remember: accounts buy, but people decide.

After you've figured out what type of accounts to target, add signals to the mix. Intent data, for example, allows you to identify which accounts on your ICP list are researching a topic relevant to your business. Using signals (which range from no intent to high intent) as a segmentation layer can help you determine who to target, or even inform the type of campaigns to run and content to serve. Intent signals will help you build a total addressable market (TAM), and from there you can layer on more information to prioritize which contacts to go after.

In ZoomInfo Marketing, you can plug in management level and job titles at target companies to identify decision-makers. Their titles may differ depending on your product and ICP, but in many cases they will start with senior director, vice president, or chief. Once you've identified potential decision-makers, you'll have access to their contact information including direct phone numbers and email addresses.

ZoomInfo's Scoops are another key buying signal. Based on proprietary surveys and aggregated news updates from accounts, Scoops notify you with relevant, up-to-the-minute information. For example, if Scoops alerts you that an account in your ICP has hired a new CMO, you may want to reach out to them quickly, since most new executives will face key buying decisions within the first few months on the job. Even if they're not the key decision-maker, they might be an influencer or champion who could help you get the deal done.

You can also use signals from ZoomInfo's **WebSights** to glean key information about anonymous website visitors. People who check out feature and product pages on your website are excellent prospects for account-based experience, since they're already familiar with your product and showing interest.

Now that you know which accounts — and which people at those accounts — to target, it's time to enhance your targeting capabilities. Often, marketers don't know what to do with all the signals and information they have, and it can be overwhelming to prioritize everything. With frontline sellers using ZoomInfo Copilot, which integrates seamlessly with ZoomInfo Marketing thanks to unified data and signals, you eliminate inefficiencies in the process and turn signal noise into dynamic GTM intelligence you can use.

Intent Topics

Any	All

| 6 Topics Selected | ⌄ |

Date Range

| Past Week | ⌄ |

Signal Score ⓘ

60 ●━━━━━━━━━━━━━━━● 100
60   100

Audience Strength ⓘ

Weak ●━━━━━━━━━━━━━━━● Strong

Identify

Data quality has a major impact at this stage — and this is where most ABX platforms fall short. If you identify the wrong buyers or don't have accurate contact data, you'll end up wasting your team's time and resources as well as losing potential revenue. As soon as your sellers get a whiff of questionable data, they will disengage from your ABX strategy and go back to what they've always done.

🛢 The Data Difference

With over 1.5 billion data points processed daily and a team of more than 400 researchers, analysts, and data scientists sourcing, verifying, and compiling B2B information, ZoomInfo's deep B2B platform has the freshest and widest range of data available on the market.

Engage

Now it's time to go to market with your campaigns. With the right tools and data, you can automate your ABX program for success at scale.

Now that you have your ICP and TAM, how do you know where to start? If you're like most marketing organizations, you don't have money to pull from to target every account. And the sales reps you send accounts to only have so many hours in a day.

This is where you lean on your tools to prioritize and focus your ABX efforts. Using a predictive AI model, ZoomInfo's Account Fit Score assigns scores to accounts that match your ICP. Based on CRM data, firmographics, and predictive factors like technographics, industry, size, and geography, this model assigns scores that indicate likelihood of conversion, allowing you to focus on high-fit accounts first.

Timing is another factor for customers looking to make any major purchase. Valuable buying signals, like intent data, public statements, and proprietary surveys can tell you who is in the market for a solution like yours right now. The more channels you use to get aligned messaging to the right people at these accounts — like ads, email, and SDR outreach — the faster you can position your company as the right solution for them. Accounts with a lower signal profile can go into lower investment channels like email to warm them up for a conversation later on.

To identify who is looking to buy, ZoomInfo Marketing gives all accounts an in-market score based on website engagement and intent signals. The higher the in-market score, the more likely they are to have a positive interaction — and ultimately buy.

Engage

Signals can also inform your content offer. For example, if a prospect's signals put them early in the buyer's journey, you may want to provide them with thought leadership materials that teach them about a problem and how they can solve it. If they have stronger intent to purchase, you could provide them with solution-focused content and direct response offers like "get a demo" or "start your free trial." The more relevant your message is to their current situation, the more likely they are to convert.

Once you've prioritized your accounts and nailed down your messaging, use ZoomInfo Workflows to take ABX to the next level and dynamically engage prospects with surging signals. Based on your ICP and the signals that matter most to your business, you can build workflows to automatically catch the right contact at your target account at the right time — with messaging that resonates.
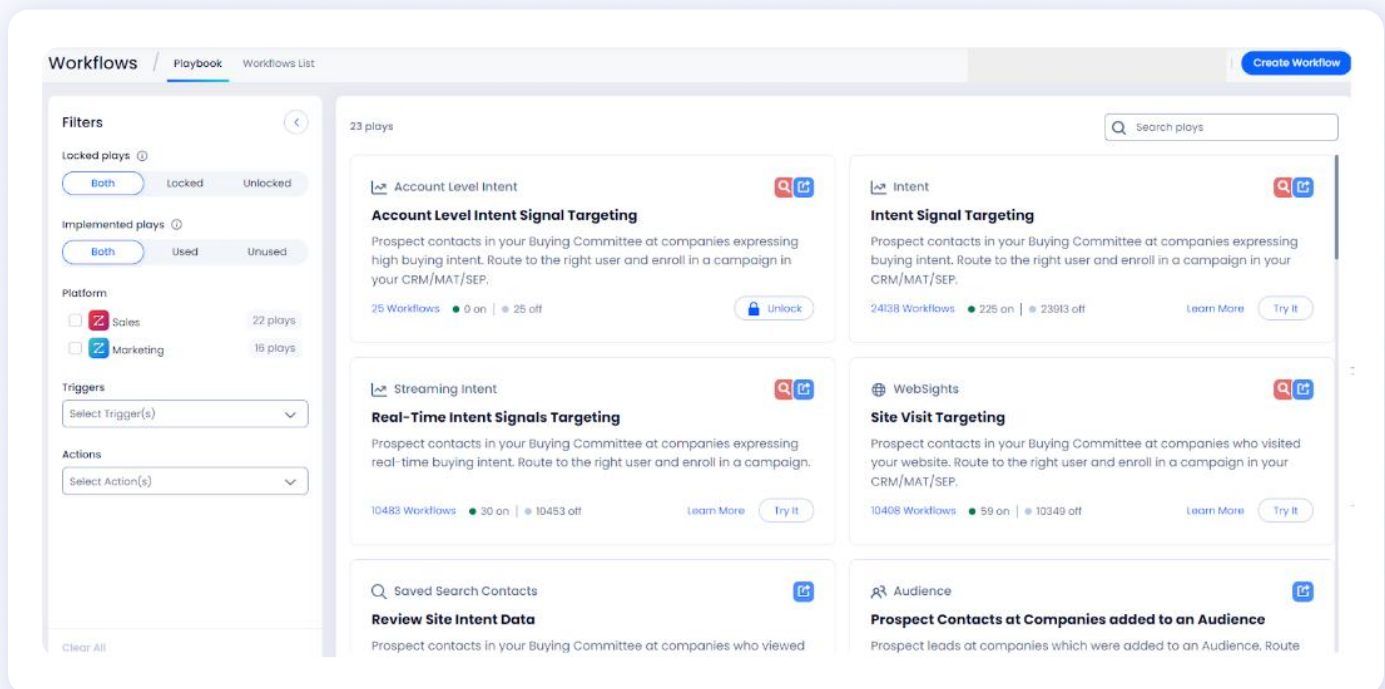
Then, use our Campaigns feature to quickly launch and manage campaigns across digital channels. Build an audience, schedule your ad run, manage your budget, and launch a campaign onto channels such as LinkedIn and ZoomInfo's in-house display advertising platform — all within ZoomInfo Marketing.

> **❝ Our robust database of contact information really comes into play here. Most people don't put their professional contact information on social media, so having a wide network of contact data gives us a much broader reach for campaigns."**
>
> **Lauren McHugh**
> Director of Product Marketing at ZoomInfo

Engage

You'll also have access to detailed reporting to assess the performance of your campaigns, the audiences in those campaigns, and your spending on advertising.
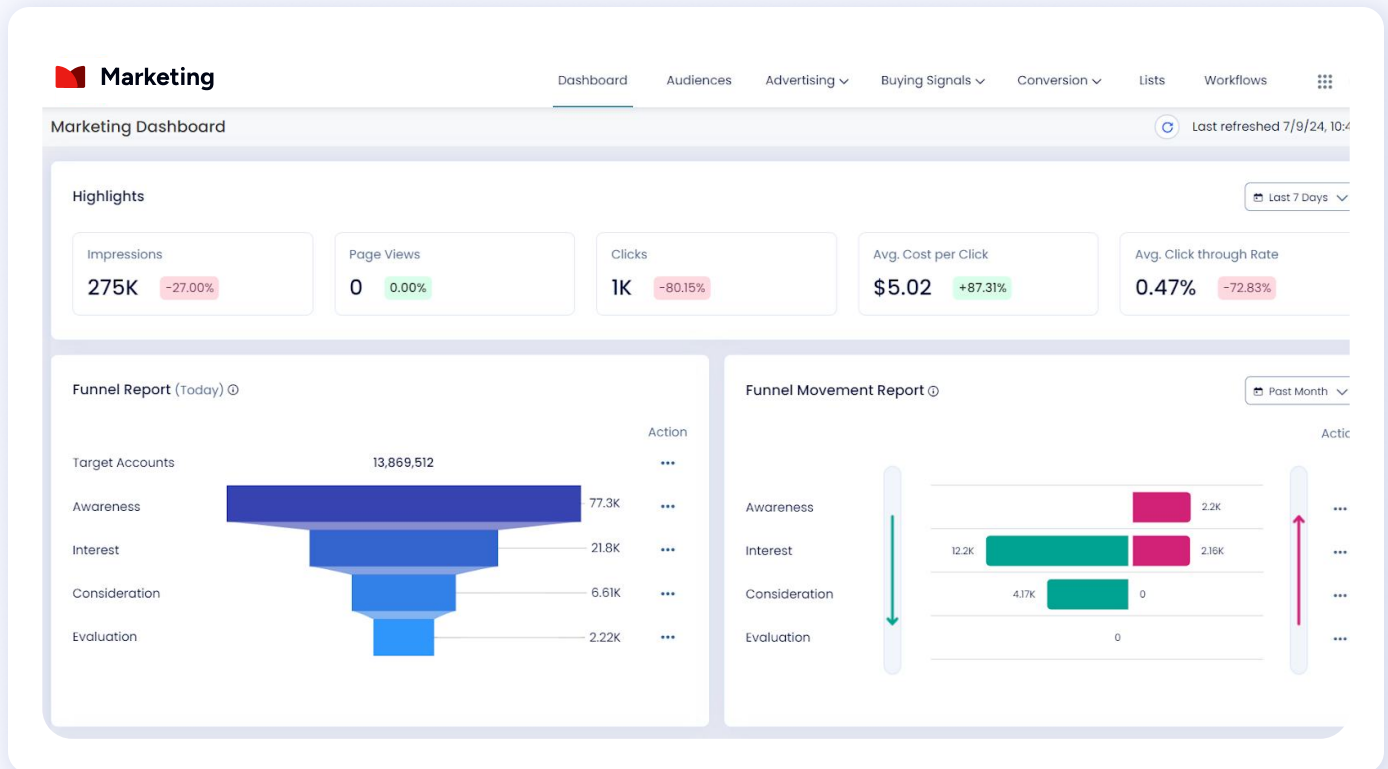
"Having the right data is key to ensuring you're investing dollars in accounts that will have the highest ROI for both your ABX program and your business," Foster says. "This level of targeting allowed us to have a 1:85 ROI on our most recent ABX programming."

🗄 The Data Difference

When you create your target audience through ZoomInfo Marketing, you can use a powerful combination of ZoomInfo's third-party data and your first-party data, such as website visitors. While both are effective on their own, combining the two means you're more likely to reach the best possible prospects for your product or service.

Convert

Your ABX campaign is up and running. You're reaching your target accounts. They're clicking on your offers, coming to your site, downloading assets, and raising their hands for more information. Here's where the right data and the tools to put it into motion can set your campaign apart.

ZoomInfo Chat is a marketing tool optimized for B2B conversion. Through an automated chatbot on your website, visitors can type in their questions and receive the information they need to take the next step in the buyer's journey.

The best part? When someone from a target account comes to your website, the appropriate sales rep will be alerted to personally take over the chat. With the ZoomInfo Chat inbox feature, the sales rep can see the prospect's name, company, recent company news, tech stack, and how many times they've visited your website.

"You'd rather have an important prospect talk to a human, not a bot," McHugh says. "The inbox feature empowers sales reps to have a more educated conversation from the get-go."

When a prospect has conducted enough research — but not engaged with chat — they typically fill out a form on your website to request a demo or meeting. At this step, FormComplete can help turn prospects into customers in two ways.

FormComplete allows you to shorten your website forms to a minimal number of fields. If you think you need between 5–10 form fields, think again: Shorter forms increase the likelihood that visitors provide their information. You only need a few pieces of information, and ZoomInfo takes care of the rest.

Even if the visitor doesn't fill in every form field, ZoomInfo Enrich steps in to append any missing information. For example, if a prospect provided their name, company, and job title, but none of their contact information, FormComplete can automatically fill in the missing fields on the backend. That gives your team all of the data they need to have an informed conversation and increase the chances of securing a meeting.

🗄 The Data Difference

Getting a target account to your site is a huge victory, and the advantage of good data continues to improve your ABX campaign results. With our data-backed conversion tools, you no longer run the risk of sending incomplete leads to sales. Instead, they'll receive the full picture of a prospect or account that's ready to learn more and buy.

Connect

You have a strong set of leads, enriched by the best data available. Now it's time to connect your marketing efforts with sales and turn these leads into contracts.

For many, this is the hard part. We've all heard endlessly how sales and marketing alignment is critical to success, but we also know how difficult it can be to reconcile different systems and approaches. [According to a 2023 Revenue Marketing Report](#), two of the top challenges to sales and marketing alignment were siloed systems (23.6%) and data that's not shared across teams (18.2%).

ZoomInfo Marketing — and its seamless integration with Copilot — can solve this final hurdle. Marketing and sales can align at every stage, from prospect to lead, lead to demo, demo to close, all the way through renewal and growth. Finally, marketing can work in lockstep with sales instead of hoping that what they're doing is working.

With ZoomInfo Marketing, you can quickly identify demand across a wide breadth of signals, and Copilot effortlessly surfaces those signals to sellers so they can act upon it.

In the past, sales teams have struggled with lead or account quality thanks to a lack of context, and managing multiple tools for marketing and sales operations only made the process more complicated. With Copilot's streamlined handover, the process is simple, fast, and unified.

ZoomInfo Marketing puts your team in the driver's seat to control the flow of leads through the marketing funnel. You can route leads to

sales during compelling events, trigger workflows to ensure your MQLs get followed up on, and ensure your must-win accounts get the attention they deserve. And when a great-fit account has shown enough signals to indicate it's time to engage, Copilot activates the final handoff.

"The most advanced companies have a tight interlock between sales and marketing, operating in lockstep with each other," says Ben Daters, vice president of sales at ZoomInfo. "With ZoomInfo's ABX platform, there's finally a solution to drive clear attribution, enabling waste-free investment to drive full-funnel activation."

Consolidating your tech stack with Copilot and ZoomInfo Marketing makes it easy to run your advertising, marketing emails, and sales engagement campaigns in parallel, all driven by a single source of truth. With a unified approach, you can ignore the noise and focus on what really matters: efficiently optimizing your marketing efforts to drive growth and hit your goals.

🗄️ The Data Difference

Because ZoomInfo Marketing and Copilot operate on the same ZoomInfo Data Cloud, they help your sales and marketing teams speak the same language. Reconciling between conflicting systems and datasets is no longer a hurdle. A seamless feedback loop between sales and marketing also allows reps to help marketing refine and further sharpen account lists for the next phases of an ongoing ABX campaign.

ABX the Way it Should Be

For years, poor data quality has kept marketers from running effective ABX programs. That stops today.

ZoomInfo Marketing is the only ABX platform built for your entire revenue team, powered by the best contact data on the planet. ZoomInfo finally fulfills the promise of ABX, bringing sales and marketing teams together in one unified platform to create a seamless buying experience that accelerates pipeline. With the right data and tools at your fingertips, ABX can reach its untapped potential.

Request a ZoomInfo Marketing demo today.

Get a Demo ↗