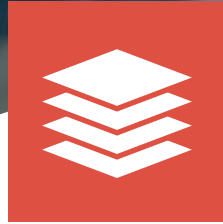


MOJO  
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# ABM TECH STACK **PLANNING KIT**

What you need to plan, budget, and pick the  
right account-based marketing software.





# I INTRODUCTION

***Account-based marketing*** sets out to engage and close target accounts to increase closed revenue, average deal size, and funnel velocity by focusing on only the accounts that fit your company's ideal customer profile. ABM is a high touch, highly personalized marketing program. It requires technology to implement that personalized experience on a programmatic basis and to automate time-consuming manual processes like:

- ▶ Sending reminders for Sales follow-ups
- ▶ Personalized website messaging based on target account needs
- ▶ Personalized ad campaigns
- ▶ Measuring KPIs and reporting progress

# A MARKETING TECHNOLOGY STACK STREAMLINES THESE PROCESSES SO YOU CAN FOCUS ON WHAT TRULY MATTERS.

*In this Account-Based Marketing Software: Tech Stack Planning Kit we've included two tools:*

**1) TECH STACK CHEAT SHEET:** There are more marketing technology platforms and software than even we know what to do with, but we've built a [\*marketing technology cheat sheet\*](#) to give you the pros, cons, and costs of some of our favorite ABM tech your business will need.

**2) PLANNING WORKSHEET:** We guide you through various technology platforms, their uses, and factors to consider as you're planning. Use the planning worksheet below to document goals, budgets, and notes.

*Here are some of the key benefits you'll find with ABM:*

**1**

Open up the [Tech Stack Cheat Sheet](#) (Google Sheets). We've organized this spreadsheet by specific technologies in their own tabs. Click File>Make a Copy. Now it's yours to edit.

*Within each tab, you'll find some of the most popular platforms for each technology and details about their pros, cons, pricing, and what real users are saying.*

**2**

Complete the Account-Based Marketing Tech Stack Planning Worksheet below. Reference the Tech Stack Cheat Sheet as you work through it.

**3**

Have questions? Let us know if we can help you on your ABM journey. [Let's talk.](#)

# I INFRASTRUCTURE

These are the core components of your ABM marketing technology stack. Start here and work your way into the other categories after you solidify these platforms.

## CRM

A CRM can make or break account-based marketing success, so ensuring you have a CRM that's accessible, easy to manage, and integrates cleanly with various other platforms is critical for your program. Managing customer relationships helps all departments across the organization maintain alignment about the goals and opportunities associated with each target account.

Take a moment to write down your goals and budget for your ideal CRM in the boxes below.

GOALS	▶	_____
	▶	_____
	▶	_____
	▶	_____
BUDGET		_____
1ST CHOICE		_____
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NOTES		_____
		_____
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You have plenty of options when it comes to choosing a CRM, so check out some of our favorites in the [\*CRM section of the spreadsheet.\*](#)

## Marketing Automation

Account-based marketing is meant to scale, and the best way to ensure scaling is possible is with a solid marketing automation platform to support your day-to-day processes. Whether it's adding target accounts to highly customized workflows or triggering Sales activities post-engagement, marketing automation saves time and resources across the organization and allows your ABM program to grow with as you achieve your business goals.

Take a moment to write down your goals and budget for your ideal marketing automation platform in the boxes below.

GOALS	<div>▶</div> <div>▶</div> <div>▶</div> <div>▶</div>
BUDGET	
1ST CHOICE	
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NOTES	

Marketing automation keeps you and your organization functioning like a well-oiled machine, so take a peek at some of our top [marketing automation platforms in the spreadsheet.](#)

## ABM Framework

Building the framework of your account-based marketing program is by far one of the most tasking elements of the process, but there are always resources to help you along the way. Having a strong framework that is scalable with your program as it grows ensures you have less iteration to do to the foundational pieces and can think strategically about your future growth opportunities, whether they be upselling or promoting organizational advocacy among current account customers. Strategic planning goes a long way with account-based marketing, so take the time to build a sturdy framework before scaling.

Knowing how to build the framework does involve investing a bit of your budget into planning resources. Take a moment to write your goals for your ABM framework and the budget you're most likely to spend on ensuring proper setup in the boxes below.

GOALS	▶	_____
	▶	_____
	▶	_____
	▶	_____
BUDGET		_____
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Creating the best account-based marketing framework for your business is a delicate and strategic process. We have a few ABM framework resources to share with you as you get ready to take the next steps into ABM success in our [\*\*\*ABM Framework tab of our spreadsheet.\*\*\*](#)

# I ACCOUNT SELECTION

Choosing target accounts and ensuring the ability to iterate and scale are critical for ABM success. These tools will help you select and edit target accounts throughout your ABM process.

## Predictive Analytics

Unsure if your CRM target accounts will close or upsell this quarter? Predictive analytics platforms give you insights into buyer intent within your target accounts. These tools apply intent data on top of the account data in your CRM, to help you see who is actively searching for your product or service, who is likely ready to buy and when — all based on intent signals. With predictive analytics platforms, you'll have to take the time to enter accurate ideal customer profile data to ensure the AI is learning the traits that signify great fit or poor potential for closed new revenue. Additionally, predictive analytics tools can take this data and find similar accounts with shared traits, so you can expand your target account list.

How valuable is the insight into the future of your ABM program's success? Take a moment to jot down your Predictive Analytics platform goals and budget.

GOALS	<div><div></div><div></div><div></div><div></div></div>
BUDGET	<div></div>
1ST CHOICE	<div></div>
2ND CHOICE	<div></div>
NOTES	<div><div></div><div></div><div></div></div>

Looking for suggestions on which Predictive Analytics platform might be right for your business? We have a few favorites listed in the [Predictive Analytics tab in our spreadsheet.](#)

## Data Enrichment

The data in your CRM is most likely incomplete or inaccurate. Data enrichment tools have the ability to append missing data points and ensure clean data in your current CRM. Enrich account information like company size and create more comprehensive contact profiles to improve tactics and increase ROI.

How important is this data to your ABM program? Well, we think it's pretty critical. Write down your ABM Data Enrichment platform goals and budget in the boxes below.

GOALS	<div><div></div><div></div><div></div><div></div></div>
BUDGET	
1ST CHOICE	
2ND CHOICE	
NOTES	

Wondering which Data Enrichment platform is best for your business? Take a look at a few of our preferred platforms in the [Data Enrichment tab of the spreadsheet.](#)



# I ENGAGEMENT

Creating ways for target accounts to engage with high touch, highly personalized Marketing campaign tactics and Sales outreach keeps your business top of mind. Use the following tools to increase engagement among target accounts.

## Ad Targeting

If advertising targeting feels like a mystery, it's probably because your current ad platform isn't providing you the insights you need to make the best decisions to meet the right accounts at the right time with the right message. Ad Targeting platforms take the pain out of reinventing ads for each target account with interchangeable elements specific to target accounts such as business name, industry, and location. Best of all, the metrics within the platforms are much more insightful and directly tie ROI back to the ad campaign, making your accounting department much happier and giving the ABM Leadership team more access to understanding ad ROI.

Advertising budgets can be hefty, but knowing before you launch what you're willing to spend makes all the difference. Write down your goals and budget for your Ad Targeting platform.

GOALS	▶	_____
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BUDGET		_____
1ST CHOICE		_____
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Ad Targeting platforms are as unique as your business objectives, so take a moment to read about some of our favorite [Ad Targeting platforms in the spreadsheet.](#)

## Website Personalization

You know that warm fuzzy feeling you get when you head to a website and everything is catered to your interests? That's the genius behind Website Personalization platform technology. When someone knows your name, what you like and dislike, and, most importantly, your budget, it makes the decision-making process that much easier for target accounts. ABM is a high touch, highly personalized approach to marketing, so by using a Website Personalization tool to ensure each account is met with that warm fuzzy feeling on your site, you're also ensuring they have an immediate connection to your company. And best of all, after a little integration and data work, it's automated and scalable for your ABM program.

Ready to take your website personalization capabilities to the next level? Think about your goals and budget as you write them in the boxes below.

GOALS	▶	_____
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	▶	_____
	▶	_____
BUDGET		_____
1ST CHOICE		_____
2ND CHOICE		_____
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Website Personalization is key to a happy, healthy ABM program. Target accounts respond best to personalized digital material, so take a peek at a couple of our favorite [Website Personalization tools in the spreadsheet.](#)

## Website Chat

Giving target accounts any opportunity or method to engage with your organization is key to ABM success, and website chat is one of those methods. A well-functioning website chat can be a gateway to answering inquiries, engaging accounts, and adding a personal touch to otherwise cold, standardized stock responses. Sales and support teams can use website chat functionality to bridge the gap between target accounts and further high-touch interactions from Sales follow-ups or personalized Marketing campaigns regarding the questions posed from the target accounts.

Website chat can be a great engagement tool, but platforms vary in price and functionality. Take a moment to write your website chat goals and budget below.

GOALS	<div><div></div><div></div><div></div><div></div></div> <div><div></div><div></div><div></div><div></div></div>
BUDGET	<div></div>
1ST CHOICE	<div></div>
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NOTES	<div><div></div><div></div><div></div></div>

Want to see what website chat tools can bring to your business? Check out some of our top picks in the [Website Chat tab of the spreadsheet.](#)

# I RESOURCES

ABM takes a fair amount of work, effort, and alignment from the entire organization. It's no easy feat, but the payoff and insights are well worth the investment. To keep your business on the right track to increasing closed new revenue, average contract size, and funnel velocity, there are a number of account-based marketing resources available from consultations to how-to guides.

Should you choose to spend on further ABM resources, take a moment to jot down your budget and goals you'd like to see as an outcome from your resource investment.

GOALS	<div><div></div><div></div><div></div><div></div></div>
BUDGET	<div></div>
1ST CHOICE	<div></div>
2ND CHOICE	<div></div>
NOTES	<div><div></div><div></div><div></div></div>

Ready to dive into ABM resources? Check out some of our highly vetted and trusted resources we use in our own ABM programs at Mojo in the [Resources tab of the spreadsheet.](#)

# WHERE TO GO FROM HERE: BUILDING YOUR ABM MARKETING TECHNOLOGY STACK

You've taken the time to think about each component of your company's technology stack and how it relates to account-based marketing. This strategic thinking exercise is one of the core components to a successful ABM program, as technology is key to successfully scaling ABM in the as your business goals are met. The next step? Take the plunge and get in touch with whichever platform providers sound like they will best benefit your ABM goals and fit your budget.

Should you need help along the way, Mojo is always here to offer advice, guidance, and get your set off in the right direction to creating an account-based marketing program that helps you achieve your business objectives and scale as your program grows. Feel free to reach out if you have questions about ABM, the spreadsheet, or just want to talk about account-based marketing.

## HOW CAN WE HELP YOU GROW SMARTER?

Dallas | Chicago | Indianapolis

[www.mojomedialabs.com](http://www.mojomedialabs.com)

(833) 600-MOJO

[contact@mojomedialabs.com](mailto:contact@mojomedialabs.com)

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