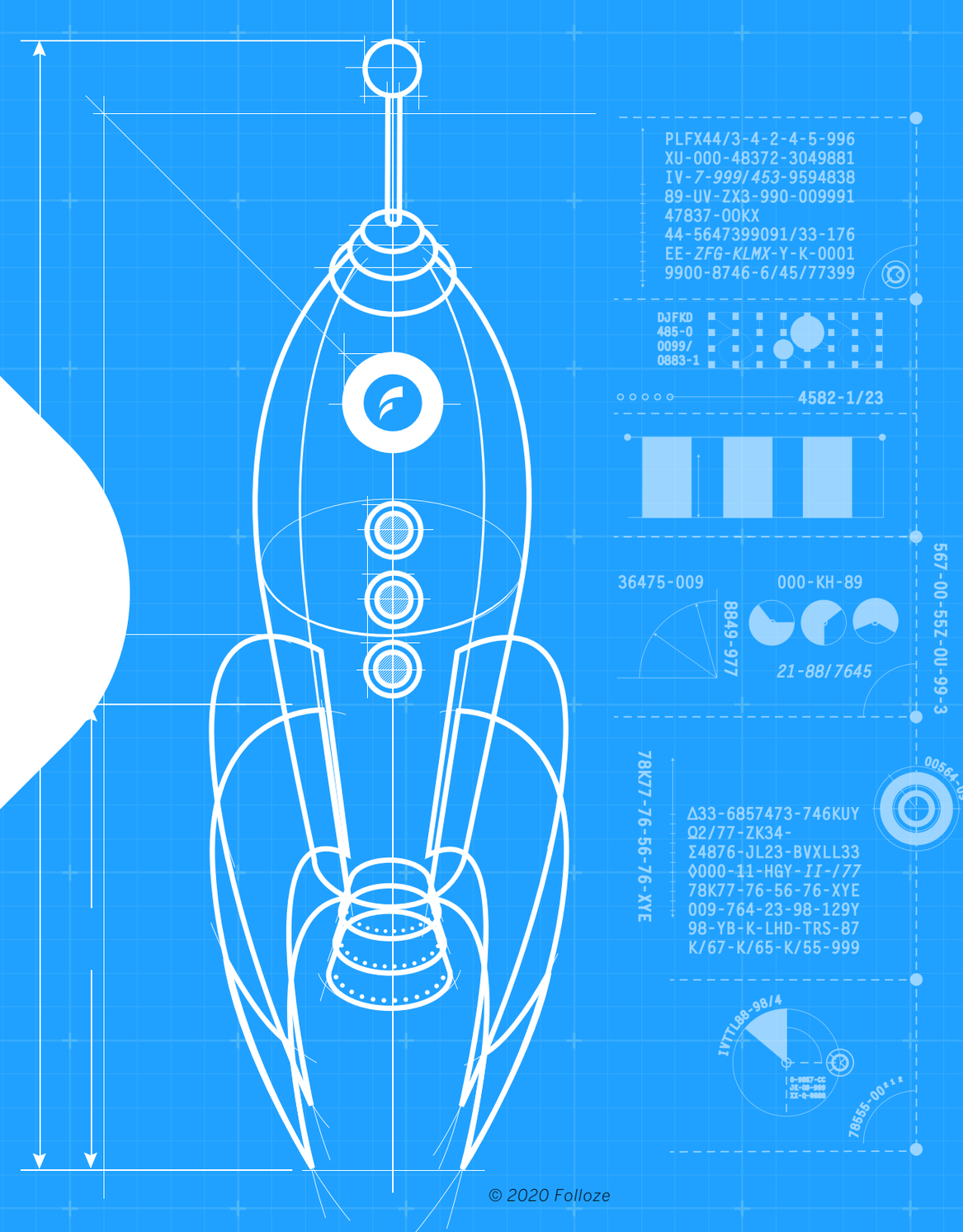
folloze

Personalized Marketing Blueprint

Get ready to launch!



Over the past few years, B2B marketing has dramatically changed.
Do any of the following scenarios ring a bell?

Lackluster Pipeline

You just exited your weekly pipeline meeting and the numbers have been consistently down. Management is on full court press and sales is complaining about pipeline contribution. You're stuck between a rock and a hard place.

Long and Unpredictable Sales Cycles

Every week, deals seem to be stuck in the pipeline – going nowhere fast. To further complicate matters, additional decision makers and buying centers keep getting added to the mix. The sales team is looking for a magical silver bullet from marketing that will push these deals across the finish line.

Traditional B2B Marketing Tactics Don't Work Anymore

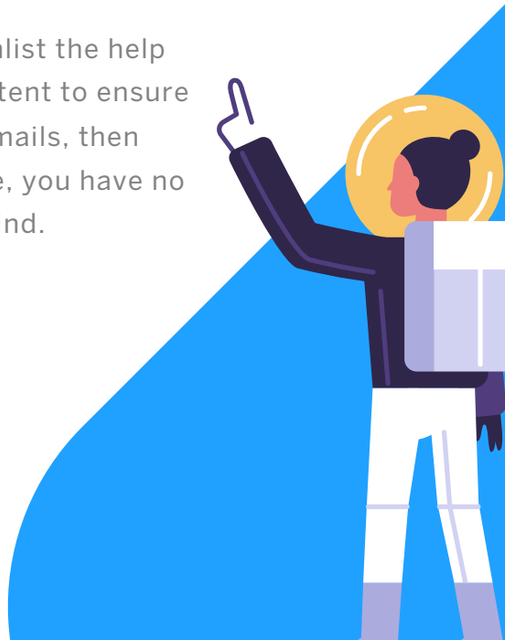
Your campaign finally launched, but the results are disheartening – single figure open rates and fractions for CTA conversions.

Your Marketing Automation Platform is No Longer Effective

You've carefully segmented your target market and planned personalized marketing campaigns. Unfortunately, your existing marketing automation platform has hit a wall and cannot personalize at scale. So, you are forced to execute a cookie-cutter campaign with poor results.

Your Sales Team Marches to the Beat of their Own Drum

To help drive attendance to an event, you enlist the help of your AE and ADR teams, and prepare content to ensure their success. The teams send one or two emails, then move onto other activities. At the same time, you have no idea who followed through. You are flying blind.



You're Not Alone.

Many of your current challenges are the result of massive marketplace shifts across the B2B landscape.

We are entering a brave new era in B2B marketing which is defined by the following trends:

1. **More decision makers:** By most estimates, the number of B2B decision makers has increased to 7-8 people across multiple buying centers.

2. **Non-linear sales process:** B2B buyers are savvy and informed. More importantly, your customers are in control and create a non-linear sales process: They can enter, exit, and jump around your sales funnel in any direction.

3. **Long sales cycles:** With more decision makers, the average B2B sales cycle can take twelve months or more.

4. **Customer life cycle focus:** As B2B strategies focus on bolstering customer lifetime value (CLV), marketers are shifting from the top-of-the-funnel demand generation tactics to Account Based Marketing (ABM) and customer life cycle strategies.

To address these new marketplace realities, B2B marketers must quickly adapt. **You are probably asking yourself: Where do I start?"**

To help, we've documented innovative ways that B2B marketers are optimizing each step of the customer life cycle – often using Folloze in the process. We've captured those learnings into a powerful engagement framework that we're calling **"The Folloze Personalization Blueprint,"** and we're excited to share with you.

Blueprint Basics

These core concepts are fundamental building blocks for executing on the Blueprint.

Before jumping into the Blueprint, let's briefly discuss three of its foundational components.

1. **B2B Customer Life Cycle:** The Blueprint's framework relies upon a modern B2B customer life cycle. From early-stage interest to closed-won deals and cross-sell expansion, the B2B customer life cycle provides a road map for marketing and sales teams to align and engage the customer on their terms. Finally, the Blueprint also helps project Customer Lifetime Value (CLV) and what each customer is worth to your business.

2. **Personalization:** As Account-Based Marketing (ABM) evolves into a mainstream strategy, B2B marketers are focusing on high-value content and personalized messaging to deliver relevant experiences - both digitally and human - across the entire customer life cycle.

3. **Engagement:** Intended to move customers through each life cycle stage, engagement strategies incorporate a mix of personalized content, tactics, and marketing channels for each target buyer or group.

The next three sections in this chapter will dig deeper into each of these Blueprint Basics.

#1: The B2B Customer Life Cycle

The B2B customer life cycle is the foundation for the Folloze Personalized Marketing Blueprint. As discussed, today's B2B marketing teams have expanded their role to optimize revenue across the entire customer life cycle -- not just the top of the funnel. As such, we define the customer life cycle as a continuum, rather than a traditional funnel.

The B2B customer life cycle is structured into four plays: **Attract, Engage, Accelerate and Expand.**

Attract	Engage	Accelerate	Expand
A marketing motion that builds awareness and captures the early interest and contact information of targeted prospects. In this phase you are building an early pipeline.	A joint marketing and sales motion to convert a prospect into an initial stage opportunity.	Advancing a prospect along the sales process to forecasted pipeline and ultimately a successful closing. Here, you are focused on eliminating friction from your sales process.	By demonstrating the value of your solution, your internal champions will support expansion opportunities (cross sell and upsell) to other departments or lines of business.

#2: Personalization

Modern B2B buyers don't want the hard sell or receiving hundreds of cookie-cutter emails clogging their inbox. ***What do they want?*** Today, B2B buyers want to be advised. Most importantly, these buyers will engage on their terms -- not what's most convenient for your company. Unfortunately, most B2B marketing teams and campaigns are organized around the impersonal nature of marketing automation platforms and high-velocity outreach tactics.

As marketing teams increasingly confront these new realities, they recognize the power of experiences to engage customers on a much deeper, personal, and human level.

Throughout the Blueprint, we will discuss how to orchestrate personalized experiences across the entire customer life cycle through both human and digital engagement. We will also explore the linkage between high-value content and data-driven marketing campaigns. Some of the most effective personalized marketing campaigns incorporate intent data that identifies organizations that are in-market for a given solution.

#3: Engagement Play Attributes

Effectively engaging customers across the entire life cycle requires clear objectives, actionable data, a revenue-focused team and the right engagement tactics.

Business Goals	Clearly defined outcomes for each play. For example your goals may include campaign conversions, account engagement, pipeline contribution, or upsell.
Revenue Team Players	Identifying and incorporating the relevant Revenue Team functions at each stage of the customer life cycle.
Folloze Engagement Rhythm®	The timing and application of engagement tactics including time-based, triggered or always-on (see more detailed description later in this chapter).
Engagement Tactics	Engagement represents the rocket fuel for your customer journey. As the core of the Blueprint, specific engagement tactics should be leveraged for each targeted buyer or group, incorporating a mix of content and channels.
Infrastructure and Data	The underlying data and system requirements for the successful execution of your Blueprint and the measurable outputs to assess progress.

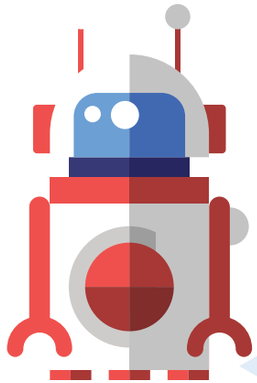
Now that we've defined the key terms supporting this Blueprint, we'll combine them into an Engagement Play Matrix: Turn the page to learn more.

Blueprint At-A-Glance

Play	Attract	Engage	Accelerate	Expand
Business Goals	• Create brand and category awareness through thought leadership • Capture early interest and contact information • Build early stage pipeline	• Build and solidify credible pipeline	• Accelerate pipeline and closed-won conversions • Remove friction from current opportunities.	• Drive customer renewals and expansions • Bolster Net Promoter Scores and customer advocates.
Revenue Team Players	**Marketing/Demand Gen** • Source • Influence **Sales** • Minimal, as appropriate	**Marketing** • Influence • Activate **Sales** • Campaign execution • Follow up	**Marketing** • Influence • Activate **Sales** • Campaign execution • Follow up	**Marketing** • Influence • Activate **Sales/Customer Success** • Campaign execution • Follow up
Folloze Engagement Rhythm®	**Always On** • Ads • Social and SEO **Triggered** • Events • Product Launch **Time-Based** • Email campaigns	**Always On** • Ads • Social **Triggered** • Events • Product Launch **Time-Based** • Email campaigns	**Triggered** • Change in account status **Always On** • Nurture programs	**Triggered** • Updates in renewal events and expansion opportunity identified **Always On** • Ongoing nurture: newsletter like rhythm, 1-2 times a quarter with updates, best practices, events,
Engagement Tactics	• Digital Ads • Paid Search • Paid Social • Content Syndication • Webcsts	• Emails • Phone calls • Marketing air cover	• Sales/marketing emails • Phone calls • Marketing air cover • Events • Web based resource	• Emails • Events • Phone calls • Web-based resources and learning centers
Infrastructure and Data	• Targeted and personalized by account	• Targeted by intent data • Personalized by account persona	• Targeted by deal flow, covering entire account	• Targeted by customer and intent data covering the entire account.

The Folloze Engagement Rhythm®

Effective B2B marketing takes discipline. Much like getting into shape or losing weight, achieving your goals requires both consistency and action.



If you've ever embarked on fitness regimen or set a goal to lose weight, you will know that sporadically going to the gym or abandoning healthy eating habits after one month will not yield positive results.

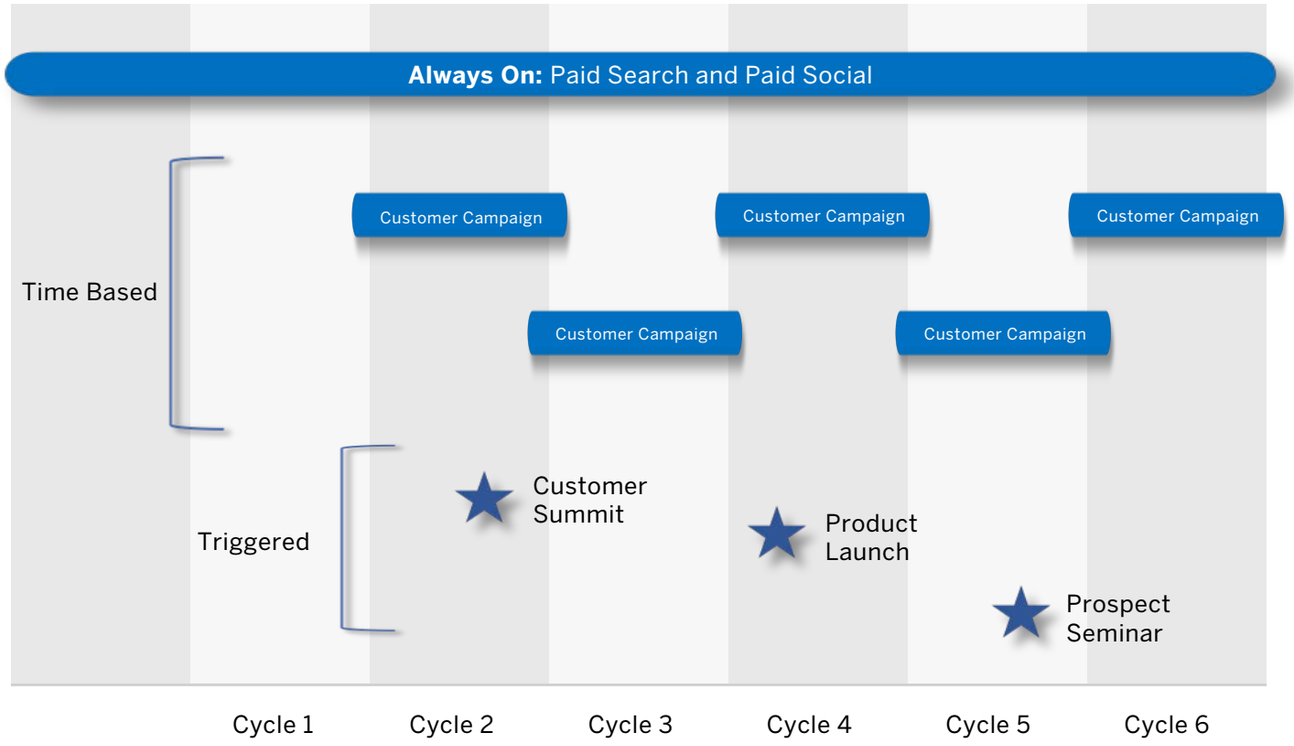
In much the same way, effectively selling into large and complex B2B organizations does not come easy or happen overnight. To succeed, sales and marketing teams must commit, execute the right mix of tactics -- multichannel and multi-touch campaigns -- at a consistent cadence over time.

Based upon this premise, we developed the Folloze Engagement Rhythm® as a methodology to drive sales and marketing engagement through every step of the customer life cycle.

We recommend timing your engagement methods with the following:

- **Triggered:** Depending on the type of change in account status, for example opportunity stage.
- **Always on:** Some engagement methods are applicable at all times, for instance or nurture programs
- **Time-based:** Repeated cycles (executed 4-6 times a year) of outreach using chosen engagement methods for selected audiences.

The Engagement Rhythm®



What makes the Engagement Rhythm® effective?

Everybody is playing to the same rhythm: Your entire revenue team is marching to the same drum beat of engagement, making it more effective and efficient.

A truly collaborative marketing and sales process: The relationship shifts from a lead hand-off to a joint engagement effort. Sales sees an increase in account coverage due to timely account personalized messaging and reduced friction.

More to come on the Engagement Rhythm® in the following chapters.

The New Role Of Marketing: Activate the Sales Team

Over the past few years, the functional role of the B2B marketer has rapidly evolved. Traditionally, the marketing team focused on demand generation and top-of-the-funnel programs by nurturing and delivering qualified leads to sales.

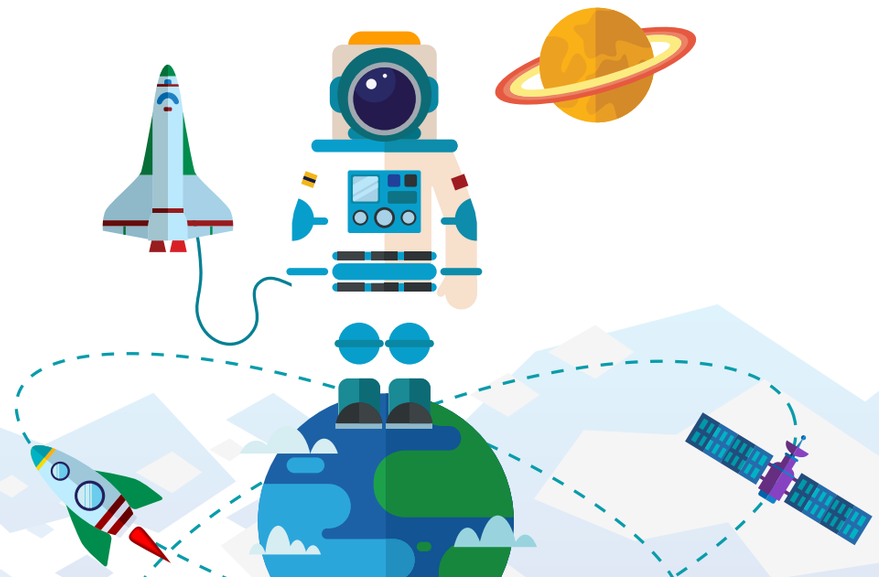
As the modern B2B sales process grew more unpredictable and traditional demand generation efforts lost its efficacy, marketing teams were forced to expand their job scope. Today, B2B marketers must lead and orchestrate success -- all in service to maximize productivity of the sales force -- across the entire customer life cycle:

- **Attract:** Define market segments and Ideal Customer Personas (ICP); leverage intent data within early-stage campaigns to raise awareness and demand among high-probability prospects.
- **Engage:** Maintain early-stage momentum and continue moving the customer forward in the buying process through relevant and contextual marketing programs and content.
- **Accelerate:** Remove friction within the account. Shorten and accelerate sales cycles by engaging the many decision-makers and buying centers across a company.
- **Expand:** Bolster "land-and-expand" opportunities by finding new buying centers within specific customers and executing account-specific marketing campaigns.

Marketing Roles

	Attract	Engage	Acceler-	Expand
Source	✔			✔
Influence		✔	✔	✔
Activate		✔	✔	✔

The chart above demonstrates the different responsibilities of these marketing teams across the various plays.



Measuring Your Success and Progress

As discussed, the B2B marketing function has evolved beyond lead generation and is now focused on driving sales effectiveness across each phase of the customer life cycle. As such, measurement metrics and KPIs must align to this new reality. Measuring the effectiveness of your marketing programs based upon MQL (Marketing Qualified Lead) or volume metrics of yesteryear are very poor indicators of success.

Marketing and sales teams must realign their metrics to accurately measure buyer intent, engagement and opportunity across each target account or market segment. Most importantly, your metrics should reflect the progress, impact and velocity across each stage of the customer life cycle.

Evolve Your Marketing and Sales Metrics

As part of the planning process, your sales, marketing and executive teams must first achieve consensus around the metrics and KPIs that will accurately measure success and common goals.

- Account Engagement
- Decision Makers Converted
- Sales Qualified Appointments
- Sales Velocity
- Pipline contribution by marketing, AE or ADR resources
- Average Selling Price
- Net Promoter Score

Using this Blueprint

Establishing and scaling your personalization strategy takes focus, hard work, and consistency. That said, the payoff is worth the effort: B2B companies that invest in personalization technologies and strategies have cited increased revenues and customer retention rates.

Fortunately, the Folloze Personalized Marketing Blueprint will help jump start your customer engagement strategy. Throughout the Blueprint,we will provide practical advice and real-world examples of how you can offer valuable, contextual and personalized experiences across the customer life cycle.

So, buckle up, and get ready to launch into the most comprehensive do-it-yourself guide for creating an out-of-this-world B2B engagement strategy!

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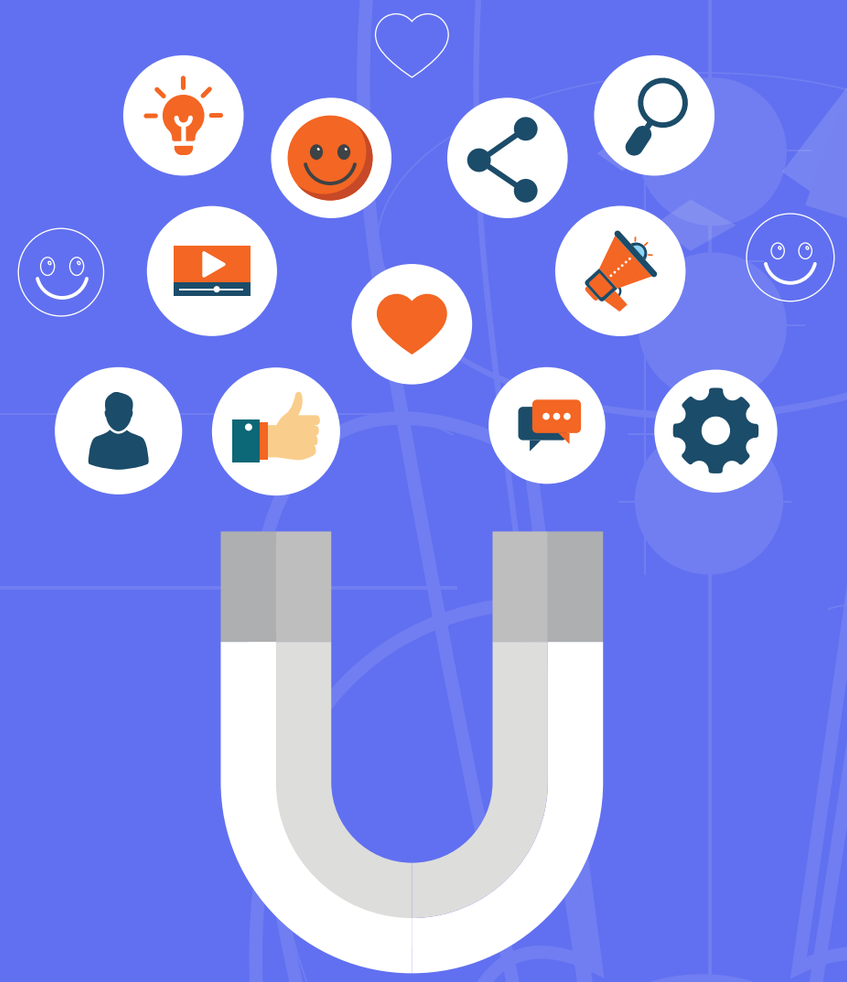
Engagement Play: ATTRACT



ATTRACT is the first engagement play in the Folloze Blueprint.

As an early stage activity used by the marketing team, the Attract play is focused on generating brand awareness and leads, and capturing related contact information.

As marketers, you are primarily sourcing and capturing intent by company and actual hand-raising prospects. However, it's also important to remember that within enterprise accounts you may also need to influence a wider circle of decision-makers who also make up a buying committee or decision-making unit.

Play	Attract
Business Goals	• Create brand and category awareness through thought leadership • Capture early interest and contact information • Build early stage pipeline
Revenue Team Players	**Marketing/D-Gen** • Source • Influence **Sales** • Minimal, as appropriate
Engagement Rhythm	**Marketing/D-Gen** • Source • Influence • SEO **Action Triggered** • Events • Product Launches **Engagement Rhythm®** • Email campaigns
Engagement Tactics	• Digital Ads • Paid Search • Paid Social • Content Syndication • Webcsts
Infrastructure and Data	• Targeted and personalized by account

Three Key Principles of ATTRACT

Here we outline three important principles to help guide your demand generation efforts with a new engagement strategy.

1

Support self-service research: When doing research, customers are trending towards a self-service model. Today, buyers prefer a more consumer-type experience that is easy, offers value upfront, and demonstrates you as a trusted advisor. Remember: 70% of the journey happens before engaging any sales rep.

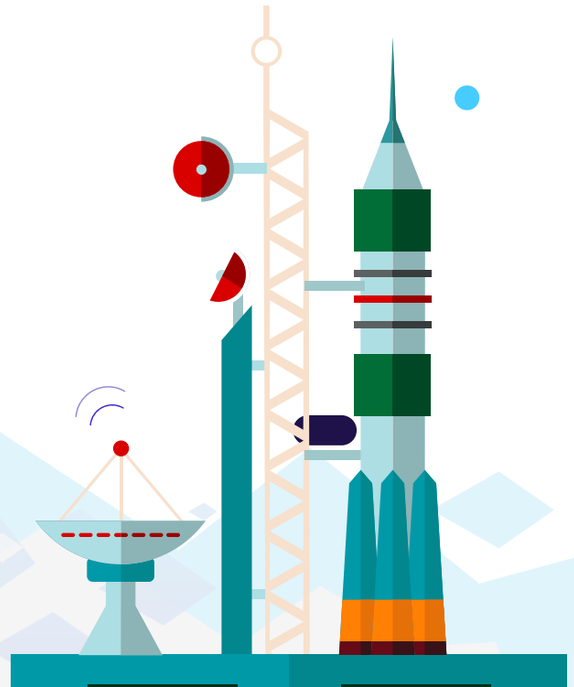
2

Content packages offer more value: Independent research now shows that relevant, personalized content packages are more effective than singular pieces of content for download after a form fill.

In fact, we've noticed that visitors are 30% more likely to consume additional content from the initial engagement.

3

Personalize demand generation: In the new digital engagement era, you must proactively target specific contacts within your list of target accounts, making your demand generation efforts much more precise and personalized. Rather than reacting to a lead who fills out a form, there is tremendous opportunity for companies to put data into action. By designing experiences that are based on rich firmographic, behavioral, and intent data, you can proactively reach target contacts and offer them a personalized, relevant, educational experience.



Business Goals

ATTRACT Goals:

- **Build awareness and interest within target accounts,** lead the conversation through your own taxonomy, and influence them as early as possible when they embark on their buying journey.
- **Bolster your brand recognition** in the context of the problem you are solving: Think solution selling.
- **Drive your audience to rely on your content** for research and track their digital footprint with intent signal alerts.
- **Make your interested stakeholders share** your content with their colleagues as the ultimate source for their research.
- **Capture relevant contacts** within your target accounts, as prospects engage with your content and marketing programs.

Revenue Team Players

Marketing

Source	Capture intent by company and actual hand raisers
Influence	We are mainly sourcing at this point, but it's important to remember we need to influence wide circles of people in our target accounts
Activate	Not yet... go to ENGAGE for that portion

SDRs/ Sales

With the ATTRACT method, your customer-facing teams can serve as an additional channel for your thought leadership and brand building efforts. As long as their engagement with the market is non-promotional, there are simple and easy ways to crank up the volume through this channel, especially when it comes to social media.

Engagement Rhythm

Always On

- Ads
- Social
- SEO

Triggered

- Events
- Product Launch

Time Based

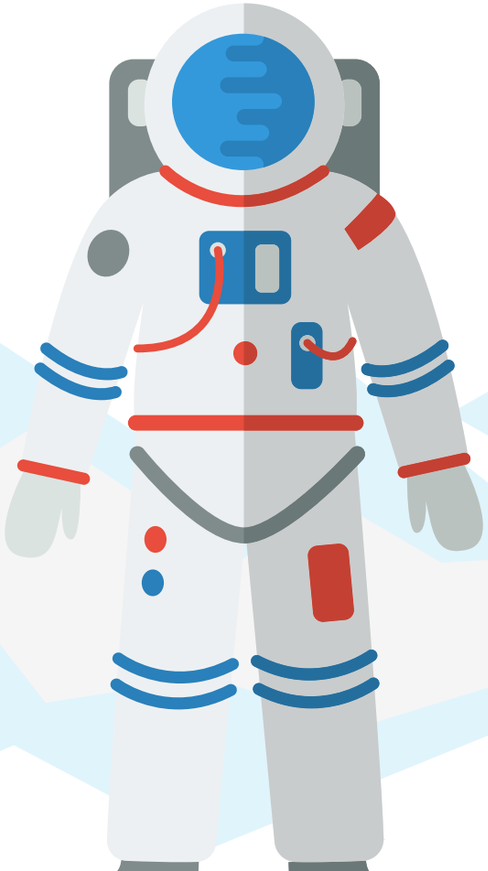
- Email Campaigns

REMEMBER: *The Engagement Rhythm incorporates specific marketing tactics (channels and content) and timing (time-based, triggered or always-on) for targeting each buyer or group.*

Engagement Tactics

- Ads and sponsored posts
- Events
- Website resource center
- Physical mailers
- Paid social and search
- Webcasts

There are several ways to supercharge your demand generation efforts by leveraging hyper-personalized content experiences across different channels. Depending on the size, maturity, and resourcing of your organization, any or all of the following tactics outlined on this page can be used in your marketing efforts.



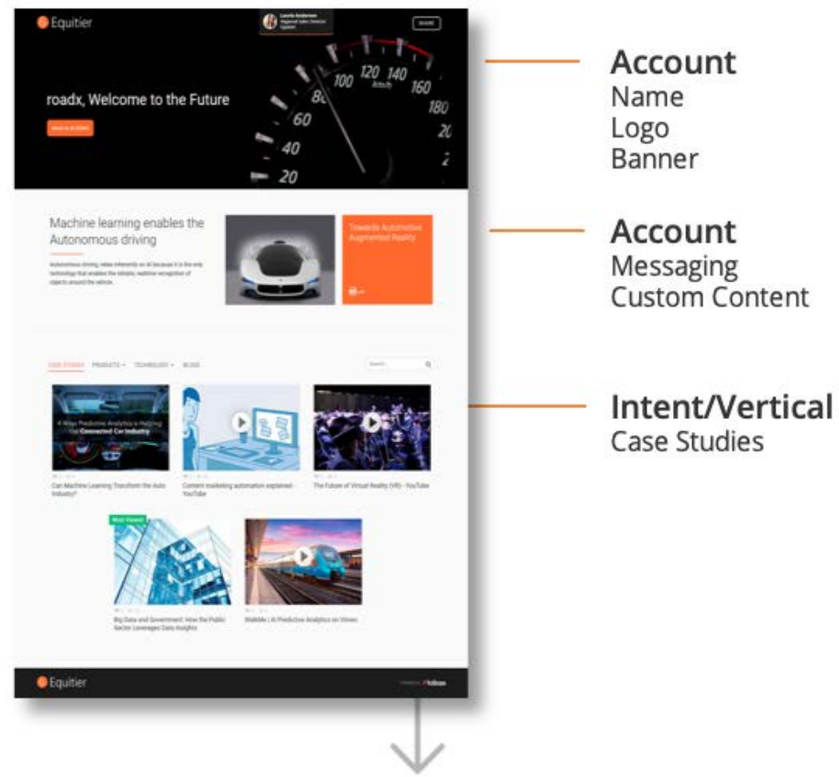
Tactic 1: Ads, Sponsored Social Posts

Why build personalized experiences as a destination for your ads and sponsored posts you might ask?

Rich Content Provide your customer with a rich content experience where they can explore on their own, engage deeper to accelerate their maturity, as captured in your scoring paradigm.

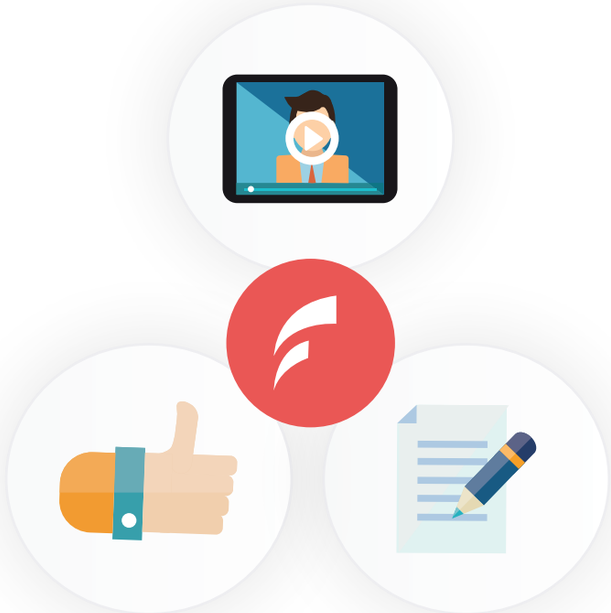
Hyper-Personalization - Targeting customers in a multi-channel approach will only succeed if you keep a personalized, yet consistent message across every channel. While personalization is easy to do via email, ads typically lead to a more generic experience. Using advanced personalization you can make sure any visitor gets the same level of customization independent of channel, meaning you can accomplish a complete tailored experience even with an ad. Whether you are targeting specific accounts, a tier of accounts, or any type of segment, we offer a simple way to make them more personal.

Dynamic Personalization



Tactic 2: Events

Did you know you can run event promotion much like an ABM campaign? Plus, many of our customers leverage personalization throughout the entire life cycle of an event.



Event invitation page

There are multiple advantages to creating a dynamic event invitation page compared to static landing pages:

- **By including rich video and photo content** from previous events, your invitees will be able to connect with the "vibe" of the upcoming event and increase the likelihood of registration.
- **You can also offer information about your company, solution, and product** to people who do not attending the event. Instead of losing them as bounces from your landing page, you can engage and keep them on the page longer.
- **Leveraging historical data**, you can also send targeted email invitations by industry, role or interest with personalized invitations to the event, emphasizing the value of the event for the account or segment. The goal is to drive higher engagement and attendance at the event.
- **Lastly, harness the tremendous potential from your sales reps or SDR teams** in the event invitation process. In some cases, we have seen 100% increases in registration. Work with your sales team to insert a link to your Content Site on their LinkedIn profile or email signature with an auto-personalized contact card.

Customer Success

ServiceNow recently promoted their annual user conference through their BDR team using a Folloze board. By combining BDR workflows with targeted Folloze boards, ServiceNow exceeded their attendance targets. In the same way, our customer Marketo doubled registration to their annual partner event by leveraging their customer success team with Folloze boards.

During the event

Consider this lovely thought: never print another brochure, so you have one less thing to carry home (or to the nearest trash bin) from a trade show. Instead, use a Folloze board as a digital brochure, and showcasing the booth, as well as a leave behind.

Customer Success

AudioCodes Event Campaign: At Microsoft Ignite 2018, AudioCodes leveraged Folloze boards on three iPads at their booth. After a prospect conversation at the booth, the event staff then closed the loop by sending that board to the recent visitor directly from the very iPad they were using. This simple trick ensured a fast and timely follow up.

After the event

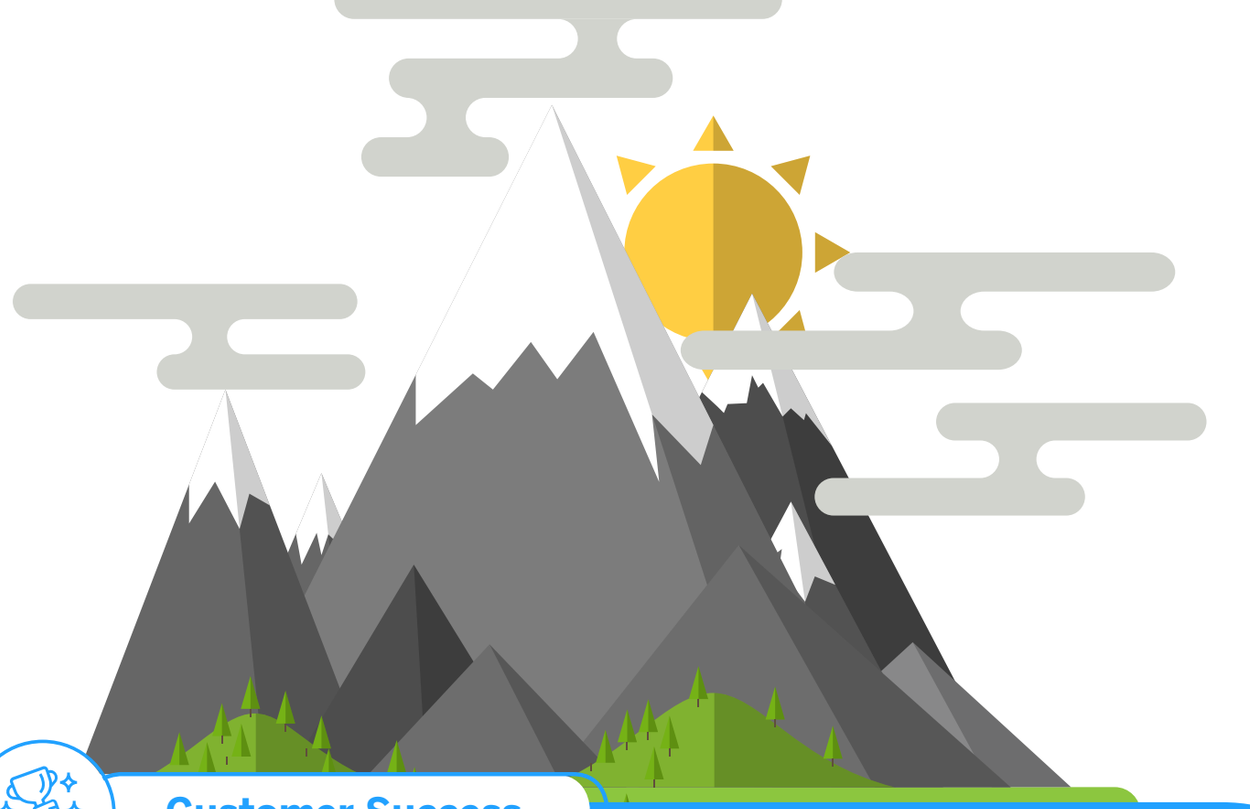
Sending a Folloze board with the event presentation, session recordings and photos is the perfect way to follow up with attendees and non-attendees. We found that photos are a great way to lure people in. Who wouldn't want to see their own photo? Here too, consider leveraging sales reps in the follow up, where applicable.

Customer Success

Event Follow-Up Campaign: Riverbed Technologies recently leveraged Folloze after their Disrupt, D.C. event, targeted towards federal government accounts. Folloze provided post-event marketing content aimed at both attendees and non attendees. The campaign generated multiple marketing qualified leads over the two weeks following the event, even among prospects who were not able to attend.

Tactic 3: Physical Mailers

Physical mailers have been making a big come back in the ABM world. The overload of digital marketing makes physical offers stand out and get noticed. But why not get the best of both worlds? Add personalized links to corresponding Folloze boards to your postcards or packages in the form of QR codes or vanity URLs. Each link is unique and personalized to the recipient, presenting them with relevant, just-in-time valuable information.



Customer Success

Folloze customers Sensus and Autodesk both executed large-scale physical mailer campaigns that included a link to a board. For Sensus, the mailer represented one component within a broader campaign targeting utility prospects that did not have a relationship with the company. For Autodesk, the physical mailer and the accompanying board were also part of a broader ABM strategy. Both boards were on the promotional end of the scale, with a very clear CTA attached to them.

Tactic 4: Website Resource Centers

The buyer journey starts with exploration around a business problem. As such, we want to give buyers a comprehensive package of content that helps them define the taxonomy of the business problem and its different solution approaches.

Build a resource center on your website using a Folloze Content Site. The Content Site will allow you to manage hundreds of assets aggregated from every possible source that can be consumed in one place. You also have the option to gate specific content, and all content is searchable, built into multi-hierarchy filters, and is SEO friendly. The site will become the one-stop-shop when buyers are looking to learn how to solve their business challenges, and you become a resource and a respected advisor. Feature the resource center throughout your website, as a whole or highlight specific areas, and link to it from different places on your website and other web assets.

You can also dynamically personalize the resource center to the visitor. You can map content, as well as other elements on the site, to visitor attributes such as location, role, vertical and even specific accounts, and Folloze will use IP information to personalize the page in real-time.

Thought Leadership: Your social team is probably re-tweeting and sharing content generated by other media outlets or authors. You should curate and centralize that content into a Content Site (even if the asset is hosted on a third party website) and promote via social and other channels. This tactic increases traffic back to your website property and improves engagement and your overall thought leadership presence.

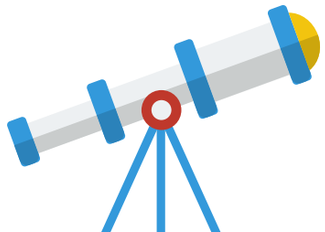
Work with your sales team to put a link to your Content Site on their LinkedIn profile or email signature with an auto-personalized contact card. They will receive insights regarding visitors coming from their profile via analytics and will benefit from the ongoing fresh content you manage and apply.

A great way to promote high profile events, surveys, or reports is adding a call to action promotion. Its as simple as creating a text call out that links to what you are promoting or if you want to be fancy, create a customer graphic with the call to action (CTA) button built in that links to the promotion.

Tactic 5: Social Media

As part of your active **social listening and response strategy,** build a few Folloze boards around topics that are interesting to your audience, or as a response to a promising conversation. The content can also be curated and surfaced from other sites and publishers. Use these comprehensive content packages as part of your response to social conversations in the context of *"here are some content assets I have collected around this topic".*

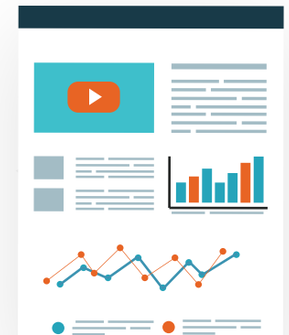
Since the curated content assets are delivered through your branded property, this tactic will elevate your position and trust within the visitors and give you data about accounts and sometimes even contacts.



Additional Engagement Tactics

As you can imagine, there are an infinite number of use cases that can benefit from packaging content to support your demand generation efforts. Some additional ideas include:

- **Product Launch -** assets published across a variety of destinations (interviews on 3rd party publications, YouTube, Vimeo, Facebook, blogger sites,...) and together tell one story.
- **Account site -** this is a pure ABM tactic for either before the initial sale, or after, to promote content consumption, such as success stories.
- **Partner nurturing -** periodical updates to partners around your latest content helps put your value proposition front and center. One of our customers increased deal registration by 30% using this strategy.
- **Executive Briefing Center (EBC) -** consider augmenting the quality of your physical executive meeting with a powerful digital experience, before and after the session. This allows your customer to continue the journey on their own and your team to track it.



Infrastructure & Data

As you execute campaigns, data plays a central role. Specifically, each personalization campaign has three data streams:

- **Two input streams** for building an important and universal role across the audience and to enable the entire customer journey.
- **One output stream** for the engagement with the campaign itself.

As you will see in future chapters, the output stream is serving as an input stream for future campaigns.

Content

As always, when building out marketing campaigns, you need to be very conscious of the type of content you share with customers and make sure it aligns with their customer journey. Below are our recommendations on what types of content are best suited for the ATTRACT Engagement Play:

- **Case studies, thought leadership articles, and third party research:** This content focuses on educating by highlighting and answering real world business problems.

- **Combine short and long form content:** Depending on the channel, by merging snackable content like short videos and blog posts with long form content, people can self-select the format in which resonates with them most.

- **Event promotion content:** Events are a unique case where you can switch from a few content pieces for the event invitation, to many pieces for the event follow up.

- **Resource centers: These offer a large variety and allow for exploration.** Other use cases require more editing, like a curated package that was created especially for the customer.

Input Data Stream (Audience):

Defining the audience and related messaging/content is of course foundational to every successful campaign. While we won't go into further "how-to" detail, below we mention a few points for emphasis:

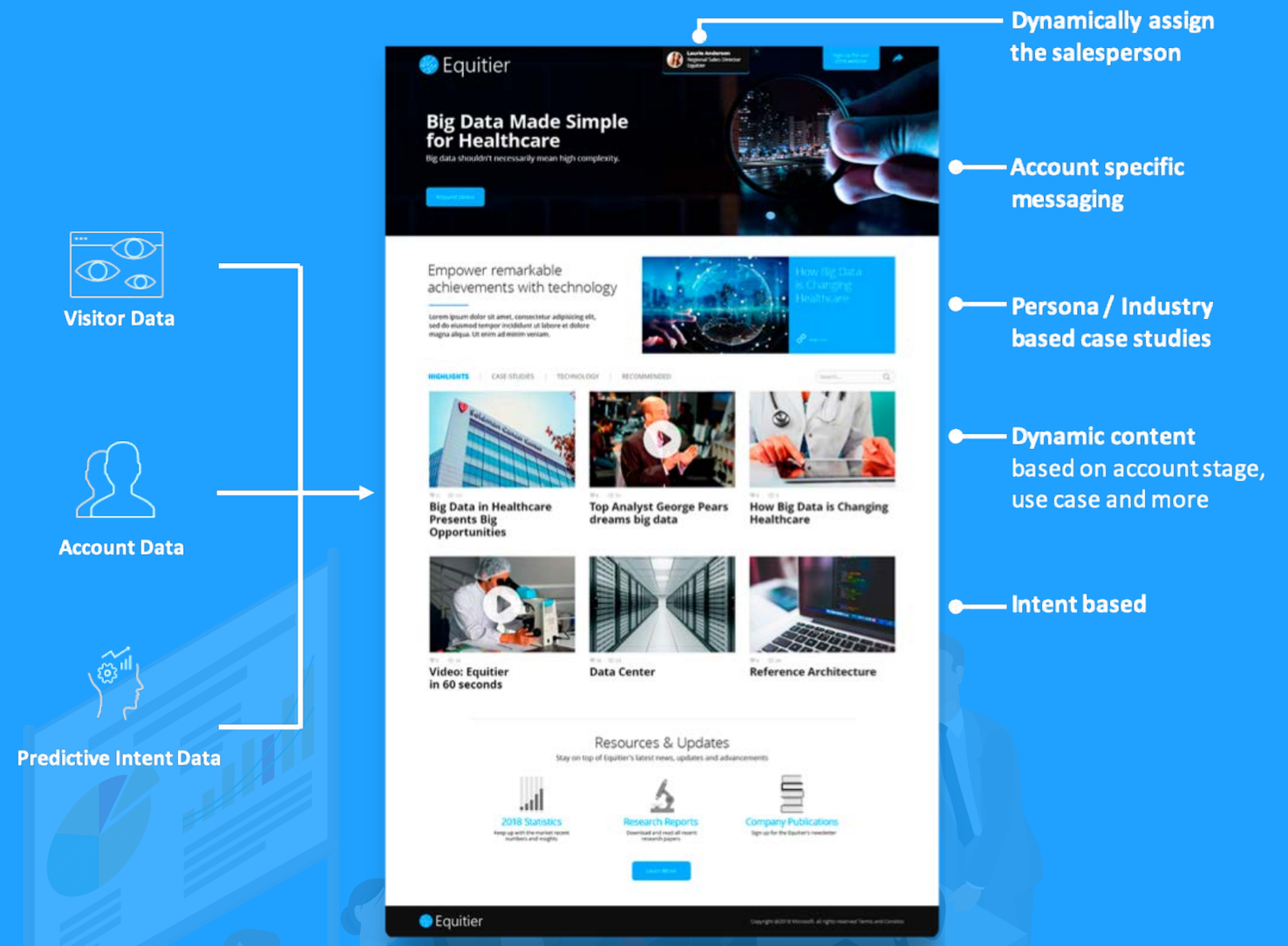
- Some of the channels used in the ATTRACT play have limited control on audience, hence personalization becomes even more important.
- In some cases we do have a captive audience, like in a certain online group or a specific event. It's important to look for these opportunities, as the ROI can be much higher.
- Know the feeling when you are looking for a new car, and then all of a sudden you start to notice that same vehicle type and color over the freeway? The same thing happens in the multi-channel approach we described in the "What" section. Use retargeting/remarketing approaches to leverage those various channels.

Hyper-Personalization

We identify two types of motions when discussing personalization:

- **Outbound -** as in email and direct mail campaigns. In this type of motion, you put a lot of effort in audience building and segmentation, and from that point on, you let the personalization engine match between the different audiences and the messaging you created for each. With a platform like Folloze that allows speed and agility under corporate governance, you can afford to create very granular messaging down to specific accounts.

- **Inbound -** as in ads, social posts, etc. In this type of motion, you leverage IP Company mapping and feed this data into the personalization engine. Consider auto-personalization of every possible part of the experience - text, visuals, and content.



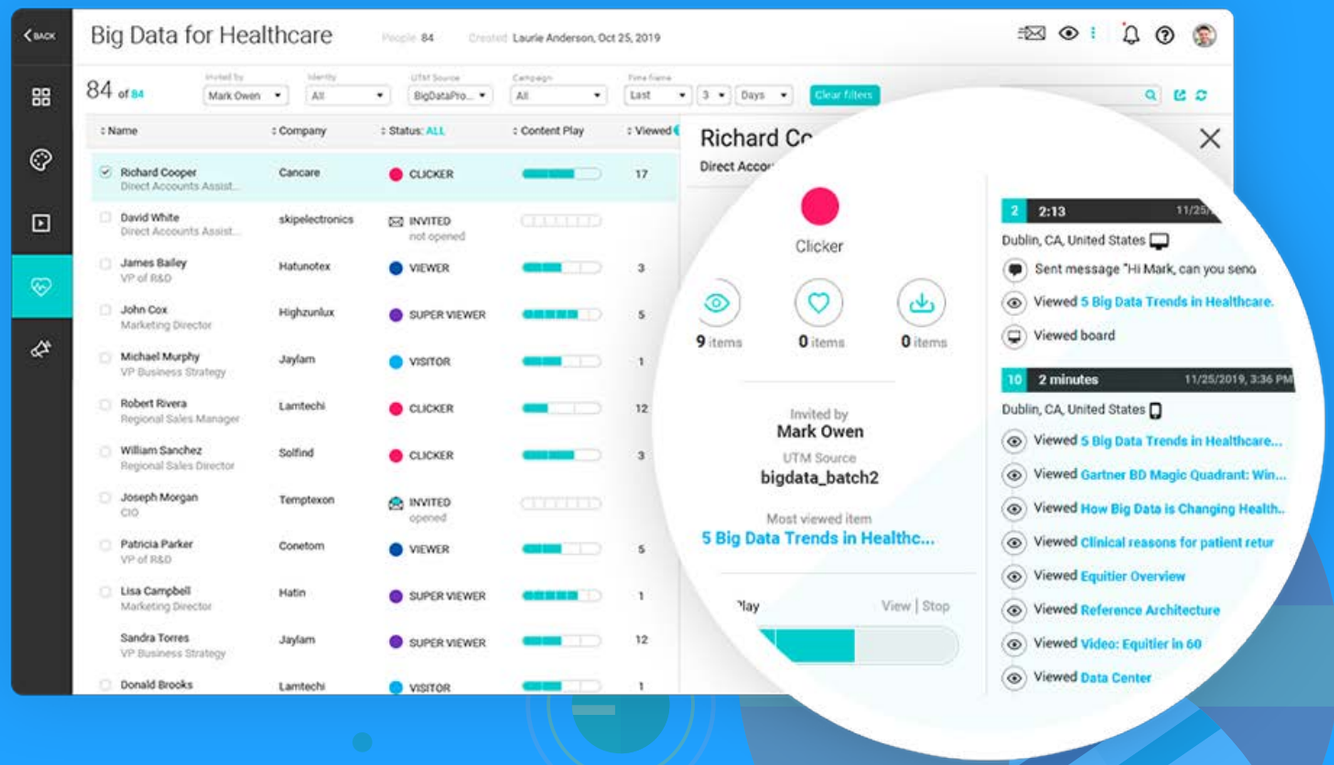
Output data stream

Segment and target key audiences for the leveraging engagement data extracted from the following sources:

- **Intent** - knowing which accounts are engaging with your content is one of the most valuable insights you will gain when you execute your campaigns. This feeds directly into the next stage in the framework when prioritizing which accounts you should target and increase your engagement efforts, as you will see in the ENAGE, ACCELERATE, and EXPAND plays. Naturally, accounts that showed interest in your solution will be at the top of the list.

- **Captured contacts** from gated content or Call-To-Action clicks.

Leverage intent and customer data to segment targets and execute key campaigns.



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Engagement Play: ENGAGE

Engagement Play: ENGAGE

***ENGAGE* is the second play in our Personalization Blueprint and is one of the cornerstones for achieving ABM success,**

At this stage you already have strong targeting data and are ready to engage with prospects of the highest propensity to buy, either new logos or existing customers. Usually, you would simply provide leads to your sales people. The reality in enterprise is that most of these leads never get pursued in a timely fashion, which means a huge portion of demand generation investment is wasted. Some claim it's north of 70%!

During the critical ENGAGE play, the sales and marketing teams must demonstrate value and build trust with buyers.

The Folloze ENGAGE Play is a new approach and is based on a highly orchestrated motion of data, content and messaging. Teams relying on old-school tactics such as aggressive telemarketing or spray-and-pray email blasts will be sorely disappointed.

Play	Engage
Business Goals	• Create pipeline
Revenue Team Players	Marketing • Influence • Activate Sales • Campaign execution • Follow up
Engagement Rhythm	• Engagement
Engagement Tactics	• Emails • Phone calls • Marketing air cover
Infrastructure and Data	• Targeted by intent data • Personalized by account persona

Business Goals

ENGAGE Goals:

- **To engage in early conversations** with prospective accounts that are actively in the market

Revenue Team Players

Marketing

Source	Capture intent by company and actual hand raisers
Influence	Keep motions from ATTRACT play as air cover
Activate	Package data, content, messaging and workflow for sales

Sales Team

Campaign execution and customer facing

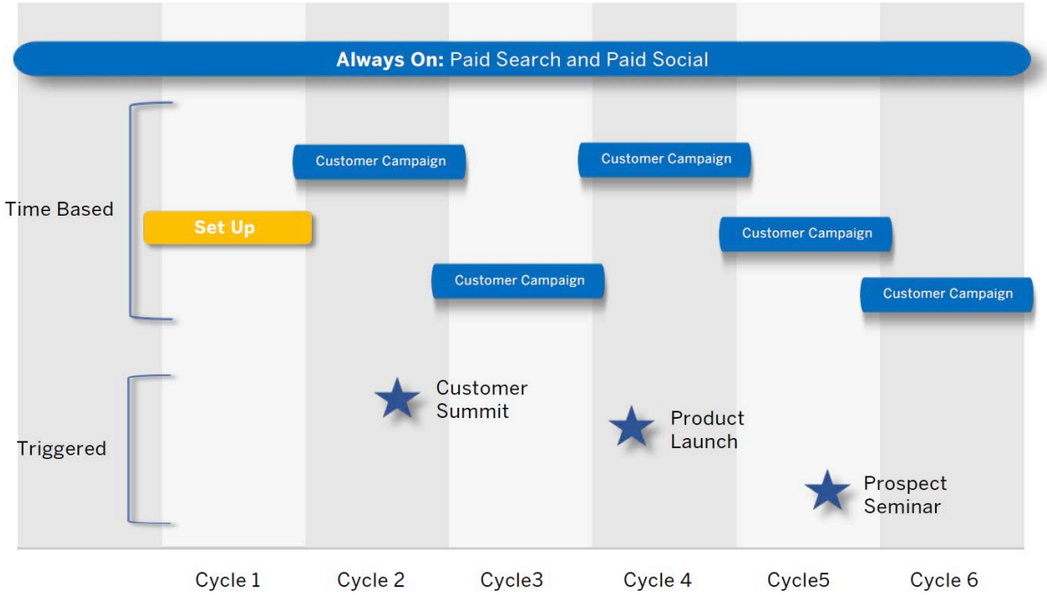
Folloze Tip

Consider renaming SDRs (Sales Development Reps) to ADRs (Account Development Reps). This adjustment will internally promote the account development process and realign the mindset within your organization to selling into and building trust within key accounts.

Engagement Rhythm

In the ENGAGE play, we typically look at a rhythm of 4-6 engagement cycles that involve both marketing and sales. The process consists of specific prep work across data, messaging and content, as well as the engagement itself, and its output. For each cycle, we suggest selecting one or more segments. Each segment has a built-in sequence of touch points.

In the image below, we offer a sample of what three Engagement Rhythm cycles might look like for an ENGAGE Play. Spanning across a 6-month time frame, the first month cycle should be dedicated to set-up, in which you focus on your input streams including intent, account and install base data, as well as your target accounts. The following four months should be focused on executing highly orchestrated and multi-channel engagement campaigns across your sales and marketing teams.



Folloze Tip

Consider launching a Folloze content play (5-7 touches across social, emails, calls, Folloze content sites etc). Month four is where you kick off your second engagement cycle and begin again in the set up phase, yet this time with your output streams MOA (?), contact details and opportunities. Similarly to Cycle 1, in months two and three you once again run your multi-channel campaigns leveraging your output streams.

Engagement Tactics

Source

In the ENGAGE play, sourcing has already been completed in ATTRACT stage – hooray!

Influence

Here, target accounts are included in marketing outreach programs that deliver ongoing relevant personalized content to ensure you remain top of mind and are trusted as a thought leader. While the “Activate” portion of this play is heavy on emails and calls, the “Influence” portion is where you want to keep a multi-channel approach, led by marketing. Examples of different types of outreach channels can be found in the ATTRACT section of this playbook, where we discussed website resource centers, ads, social ,media, and a host of other tactics.

Activate

- **In each cycle and for every marketing segment,** the idea is to drive an orchestrated campaign combining data (audience), messaging, content and workflow.
- **Start by building your target audience** (see next section about Data).
- **Launch a Folloze Content Play (5-7 touches)** through your ADR and AE team (depending on your internal structure, stage of accounts, etc.). Continue to provide value, leveraging the content.
- **ADRs/ AEs should contact recipients in parallel through social response,** social connections and phone calls to book meetings. The social venue is a good starting point, as it's a place where people have their guard much lower, as long as it's not an obvious promotional InMail. Please note that it's important to use all these channels in parallel..
- **ADRs/AEs will prioritize their follow up** based on engagement indicators coming from the campaign, leveraging real time notifications coming from Folloze.
- **You may also want to create sub-audiences** with slightly different content plays that target different personas or contact engagement stages. For example, webinar/event follow ups, actual form fillers, peers to form fillers, contacts with no pre-engagement.

Event Invitations

Across all our customers, events, both physical and virtual, play a huge role in the ENGAGE play. You can use event invitations and follow ups as one of your Engagement Rhythm® outreach campaigns. In your Folloze board for an event for example, include information about your solution in addition to specific event information. This way, you can increase your chances to engage with prospects who were not able to attend, but are still interested.

Customer Success

Cisco developed an entire go-to-market strategy built around demo-day type events, which they call "Test Drive Events". So far, this strategy created a 9-figure pipeline for Cisco. These are SE-run events, by engineers to engineers, leveraging a peer-to-peer approach. Event invitations are sent to customers by AMs and SEs, and the audience for the invitations is built using intent and install base data.

Campaign Follow Up

As marketers, we expend a lot of energy launching a campaign and sometimes neglect the post campaign follow up. The follow up process is just as important as the campaign itself, especially when your company is top-of-mind with engaged prospects and customers.

Customer Success

Autodesk explored ways to solve the problem of hand-off from marketing to sales during prospect engagement. Content boards were selected for their ease of upkeep in both sales and marketing, real-time analytics for named and owned accounts reduced time intensive reporting, enabling their ABM success. Sales and marketing were now working hand in hand to close business in a matter of hours vs. days and weeks. In fact, with one interaction, a salesperson was able to close an account 5 months earlier than previously anticipated.

Data and Infrastructure

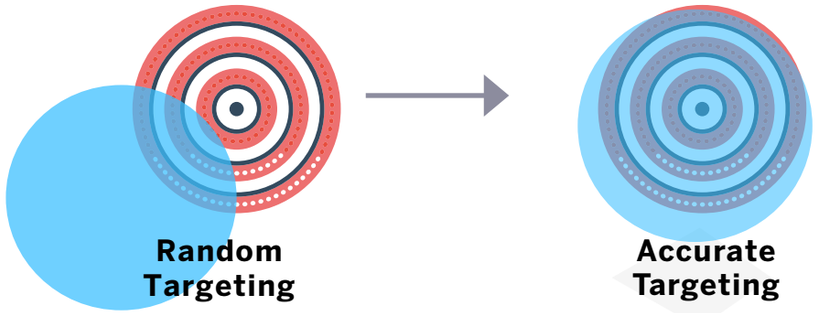
Data input stream

This is NOT about individual leads, it's about your target accounts. If you have had discussions with specific people, met them at an event, or they came to one of your webinars, consider them as proxies
on behalf of their organizations. Develop a list of all relevant contacts from these accounts and continue to engage with them. **Remember, it needs to be beyond just the individuals you've already had discussion with, that's an ABM approach to the whole strategy.**

Folloze Tip

About Account Tiers: You may want to identify some key accounts where the process is highly customized for above and beyond this broader exercise, especially if you have an existing relationship with specific history. Many of the same steps should be followed, only highly-customized.

Creating a solid process for selecting your target accounts is key to a successful engagement strategy. It's imperative to focus your ADR and AE's time on accounts that are ready to buy and in the market for your solution.



Targeting should be built out of the following signals:

IP - Company mapping of anonymous visitors on your website and other digital assets.

Social activity by your target accounts. Track the relevant hashtags, associations and groups. Leverage tools like LinkedIn Sales Navigator to track specific accounts and people, or a platform like Sprinklr for social listening.

Intent signals - Consider using a service like Bombora or 6sense for intent data, as it opens a far wider view and is even more important if your air cover efforts are limited.

Contacts from your database - Contacts who filled out online forms, attended a recent in person event and/or webinar.

Folloze Tip

How do you run an account-centric process in your CRM?

- **Create an account field with a field name of account stage.** Include a stage field in your CRM at account level with the following values: Open, Working, Engaged, Opportunity, Customer, Past Customer, Nurture, and Disqualified
- **Create another field to "Score" account** readiness incorporating the various signals. It could be as simple as Ready, Warm, None or more complex as you find suitable.
- **Prior to the beginning of each engagement cycle** update these values for the coming cycle:
  - Decide which of the previous cycle you will be keeping and add it to the current cycle as "working," otherwise associate them to other stages
  - Add the new targets based on readiness level
  - Bring back some accounts from "park" or "nurture" stage
  - Make sure every account is assigned to an account executive and an account development rep. You will need this information when executing your content plays during each cycle

Content

Stage in the Lifecycle

Study your target list for the current engagement cycle. Are the contacts in the list in the beginning of their journey? Are they new to your brand? Are they further along in the customer lifecycle? Based on your answer, select the content that is the best fit.

Promotional vs Educational

What are your business goals for the current cycle? Are you promoting a time-sensitive event or product launch? Are you educating your accounts about your solution? Here, too, based on your answer, select the appropriate messaging and content.

Snackable vs Long Form Content

What channels are you planning to use in this cycle? Will the audience be mostly on mobile (e.g. for social posts) or mostly on laptops (e.g. for email)? The answer will guide you with your content selection. Short videos and short blog posts work for mobile, longer form content is typically more suitable for laptops.

Folloze Tip

Tip: Conversation-based content - As the name of this Play suggests, our goal is to engage customers in conversation. As such, group your content according to the actual conversations your reps are typically having. For example, the efficiency of your solution is one conversation, and can include testimonials of quick deployment and quick ROI. At the same time, the effectiveness of your solution is a different conversation, and can include stories of how your customers get amazing results using your solution.

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Engagement Play: ACCELERATE

Engagement Play: ACCELERATE

As we move to the critical phase of developing initial pipeline - named ACCELERATE - sales and marketing teams must unite to ensure that deals continue to progress.

Typically we tend to take a step back in this third stage and let the AE run the show with the goal of conversion, but as marketers, we can make a big impact by providing the AE with the right tools and the right content.

Our impact is even stronger if we activate the AEs and don't leave it to chance. And at Folloze, we've seen first hand how thoughtful, non-promotional outreach can move a deal forward or pull contacts out of the dark.

Play	Accelerate
Business Goals	• Pipeline accelerationand conversion
Revenue Team Players	Marketing • Influence • Activate Sales • Campaign execution • Follow up
Engagement Rhythm	• Triggered by deal stage • Engagement rhythm® for nurture
Engagement Tactics	• Sales/marketing emails • Phone calls • Marketing air cover • Events • Web based resource
Infrastructure and Data	• Targeted by deal flow, covering entire account

Business Goals

ACCELERATE Goals

- **Shorten cycles and improve conversions,** and especially reduce number of discussions going dark.
- **Influence the entire buying committee** beyond the business champion.
- **Empower your champion** in her consensus building process.

Revenue Team Players

Marketing

Source	Lightly look for additional members in the buying committee
Influence	Keep motions from *ATTRACT* play as air cover
Activate	Package data, content, messaging and workflow for sales

SDRs/ Sales

Campaign execution and customer facing

Engagement Rhythm

The ACCELERATE play is driven to a large extent by the opportunities that you have in the pipeline. We can identify two main "Rhythms" here:

- **On demand by the Account Executive.** The marketer's role in this case is to ensure that the AE has the latest and greatest content readily available on demand.
- **Weekly or bi-weekly rhythm of educational email campaigns** to known members of the buying committee as well as potential members and influencers within the account or buying center.

Engagement Tactics

Source

As accounts get into *ACCELERATE* play, don't hesitate, keep sourcing additional conversation through *ATTRACT* and *ENGAGE* plays, unless AEs directed you differently. If you have a "do

Influence

Here, target accounts are included in marketing outreach programs that deliver ongoing relevant hyper-personalized content to ensure you remain top of mind and are trusted as a thought leader. While the "Activate" portion of this play is heavy on emails and calls, the "Influence" portion is where you want to keep a multi-channel approach, led by marketing. Examples of different types of outreach channels can be found in the *ATTRACT* section of this playbook, where we discussed ads, social, website resource centers, and a host of other tactics.

Activate

As mentioned on the previous page, we distinguish between two main types of motions - AE driven and Marketing driven.

Approach 1: AE Driven

As part of the standard sales call follow up, your AEs probably send out content to support the discussion.

The idea of ACCELERATE is to go beyond that. Consider building ACCELERATE specific multi-touch campaigns, strictly value centric (best practices, case studies, etc.), and train your AEs to pick the relevant campaign, launch and target several members of the buying committee as a way to elevate their value, build trust and relationship with all, keep excitement high and support overall a much better conversation.

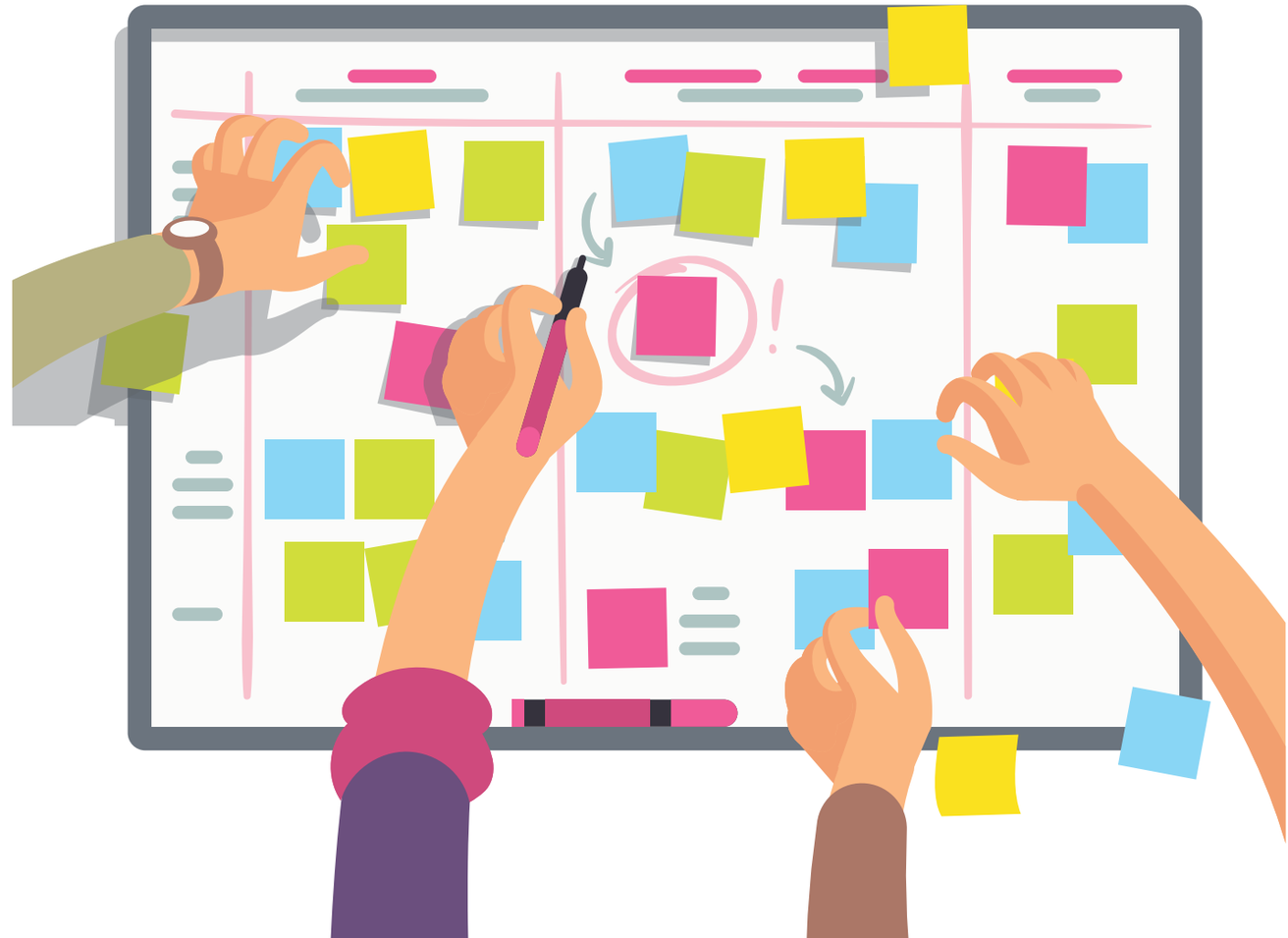
Customer Success

Folloze customer Digium sent a Folloze board to each new opportunity with an active sales cycle. To support this campaign, the marketing team created template boards that reflected the company's many different solutions. After a customer conversation, the AEs would select relevant pieces of content from the templates to quickly build a personalized board from within Salesforce, using a Folloze browser plugin that connects to the CRM. This process creates uniformity and efficiency among the different AEs. Engagement information from Folloze is then fed into their forecasting models.

Approach 2: Marketing Driven

Scale this process mention in tactic 1, to be highly structured and driven by Marketing. How would that work?

- **Marketing:** Once a week, collect data about all relevant accounts that moved to an active discussion, develop a list of the relevant contacts (champion + peers + other decision makers and influencers) in those accounts, and launch a Folloze content play from the AE to all relevant contacts. For some accounts, it may be a customized Folloze board based on what you learned specifically in the discovery calls.
- **AE:** Follow up with more people as they engage with content and/ or raise their hand.



Data and Infrastructure

Audience -- Input Data Stream

- When driven, data collection is up to the AE, naturally. Their outreach will be triggered by the typical progress of the sales cycle.
- When Marketing driven - pull active opportunities from your CRM and enrich with additional contacts within those accounts.

Opportunity Stage Detail

50 Date	Stage 0	☑
Identify Date 12/15/2018	Identify	☑
Discovery Date	Discovery	☐
Solution Dev Date	Solution Dev	☐
Proposal Date	Proposal	☐
Validation Date	Validation	☐
Close Stage Date	Close	☐
Closed Won Date	Closed Won	☐
Nurture Date	Nurture	☐
Closed Lost Date	Closed Lost	☐
Identify - Unqualified	Proposal	☐

Folloze Tip

Adding a timestamp to the transition between account and opportunity stages helps build a list that rolls over time.

Hyper Personalization:

- Collecting data and input for the personalization engine in the *ACCELERATE* stage is fairly straightforward -- we have everything we need within our CRM or Marketing Automation Platform. We just need to remember to add any new contacts who are added to the account and were previously unknown.

- Hyper-personalization can be used whether it's an AE or Marketing driven motion. If you create content packages by a combination of stage in the customer life cycle or sales conversations, personalization can enhance the experience without expending significant resources.

Output Data Stream:

At this stage, engagement information combined with specific content delivers powerful insights for the AE team. During a recent opportunity, one of our AEs received a Folloze notification indicating that one of his prospects was actively engaged with a board. In fact, the prospect spent a full hour on that particular board, Even though the prospect went dark over the past few weeks, the AE knew that the deal was indeed moving forward. In summary, data at this stage consists real-time notifications, delivered to the AE in real-time. This information is also available to marketing for reporting purposes.

Content

During the ACCELERATE play, you can leverage long-form content. Your prospects are doing their due diligence and will require detailed input to continue moving the sales process forward.

Folloze customers have been very successful leveraging content to accelerate deals and remove friction from the buying process:

- **Use conversation-based content boards** to stand out. Interview your sales reps to understand the conversations they are having with prospects in this stage of the buying cycle, then frame your content around those conversations. For example, competitive information can be a big topic for conversation for decision-makers. Weave differentiation topics and case studies of customers who switched to your solution into your content packages.
- **Adding templates for the commercial discussion,** like master services agreements, security questionnaire, etc. to the board. If your prospects downloaded or engaged with these documents, this is a clear sign for deal progress.

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Engagement Play: EXPAND

Engagement Play: *EXPAND*

Our fourth and final Blueprint Engagement Play is EXPAND. This valuable play is often the most overlooked and ignored.

The salesperson plays an even more significant role in this account stage and therefore it is critical to position them prominently. While as marketers we typically leave much of this stage up to our salespeople, if we use our depth of data on actual accounts for hyper-personalization, we can create a whole lot more pipeline and revenue by selling smartly to our account base. This may include richer data about that account that can be used: products they've deployed, their needs and upsell opportunities, key stakeholders, etc. The account personalization experience can depend on those insights and be geared to potential upsell motions, to educate the customer on best practices, and to nurture account relationships.

In this Play, we're using tactics from other plays in the Blueprint, and again tweaking messaging so that it speaks to the needs of existing customers with the potential for renewal AND expansion across additional use cases and departments. In the chart below we outline the Who, What, When, Why, and How best practices for *EXPAND*.

Play	Expand
Business Goals	• Customer renewal and expansion
Revenue Team Players	Marketing • *Influence* • *Activate* Sales/CS • *Campaign execution* • *Follow up*
Engagement Rhythm	• Triggered by renewal events and the identification of expansion opportunities.
Engagement Tactics	• Emails • Events • Phone calls • Web-based resources and learning centers
Infrastructure and Data	• Targeted by customer and intent data covering the entire account.

Engagement Play: EXPAND

Specifically, when looking at the *ENGAGE* and EXPAND plays, both are about creating net new revenue for the company, whether by expanding by selling more to the same buying center or by expanding to new buying centers. As such, you can employ similar tactics.

- **With existing customers you have rich data that can be fed into hyper-personalizing the process:**
  - **Install base** - what products or services did they buy in the past?
  - **Usage and consumption** of existing products, depth and sophistication of usage
  - **Problems** - you know which problems were solved, which new problems were created
  - **Interests** - based on digital and physical engagement
- **You already have a strong relationship with the users and decision makers in the account**

Business Goals

To increase renewals and upsell the account through:

- **Promoting adoption and consumption** through training, support, success stories, and best practices
- **Achieving good coverage** of your target account to uncover opportunities for expansion and increase your reach with the customer organization
- **Maintaining ongoing** excitement and engagement

Revenue Team Players

Marketing

Source	Covered in *ATTRACT* play. Also with existing customers many new opportunities will be created through activation of Sales and Customer Success as described below.
Influence	Keep motions from *ATTRACT* play as air cover
Activate	Package data, content, messaging and workflow for CSMs + AMs

Sales Team

Campaign execution and customer facing

Engagement Rhythm

Align the engagement plan of existing accounts to the Engagement Rhythm® of your company.

Some touch-points will apply to both prospects and existing customers. Others will be more unique to the audience and stage of the relationship.

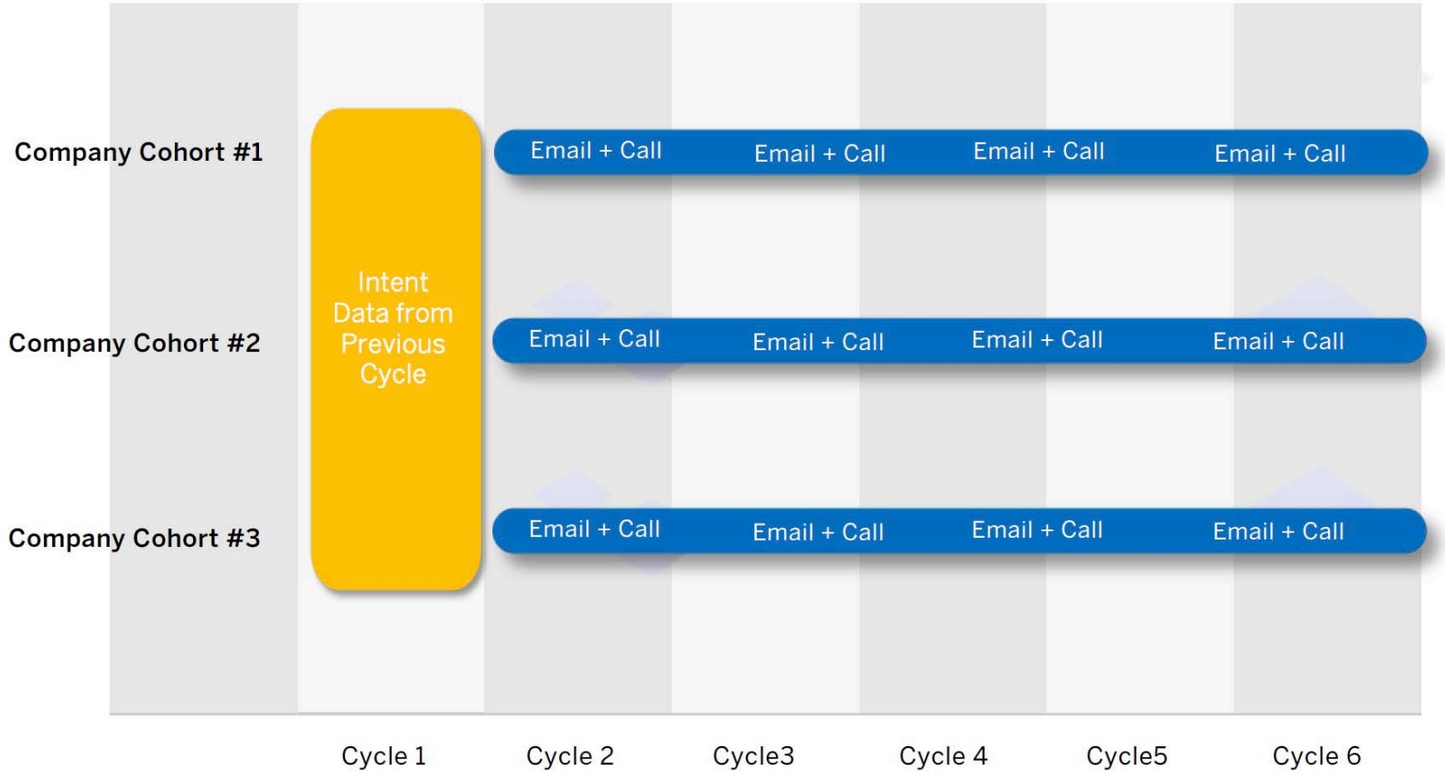
Two main cadences we identified are:

- **Upsell/cross-sell motions** - refresh your target account list every cycle and run a targeted campaign, similar to tactics used by *ATTRACT* and *ENGAGE* plays.
- **Ongoing nurturing** - newsletter like rhythm, 1-2 times a quarter with updates, best practices, or events.

Engagement Play: EXPAND

You may also want to build a campaign that combines the two cadences together.

As a reminder: The Engagement Rhythm typically consists of 4-6 engagement cycles that involve both marketing and sales. The process consists of specific prep work across data, messaging and content, as well as the engagement itself, and its output. For each cycle, we suggest selecting one or more segments. Each segment has a built-in sequence of touch points.



Engagement Tactics

Source

At this point in the customer life cycle, sourcing has mostly been completed because the account is already a customer. However, other buying centers may not be aware of your company. Your customer success managers and account managers are tasked with sourcing opportunities at this stage. Help them by planning campaigns that engage their account

Customer Success

Sharing Best Practics - Best Board of the Year
Every year, Folloze hosts a “Best Board of the Year” contest and invites users to submit their most popular boards and campaigns. The winner this year was a Microsoft user who submitted a public sector campaign. After announcing the winner, other Folloze customers leveraged this winning approach within their marketing campaigns. Be on the lookout for the "Best Board of the Year - 2020" call for submissions!

Influence

During the ENGAGE play, target accounts are included in marketing outreach programs that deliver ongoing relevant hyper-personalized content to ensure you remain top of mind and are trusted as a thought leader. While the "Activate" portion of this play relies heavily on emails and calls, the "Influence" portion is where you want to keep a multi-channel approach, led by marketing. Examples of different types of outreach channels can be found in the *ATTRACT* section of this playbook, where we discussed website resource centers, ads, social ,media, and a host of other tactics.

Activate

The mechanics of activation will be familiar at this point:

- **In each cycle and for every marketing segment,** you drive an orchestrated campaign combining data (audience), messaging, content and workflow.
- **Start by building your target audience** (see next section about Data).
- **Launch a Folloze Content Play** (5-7 touches) through your ADR and AE teams (depending on your internal structure, stage of accounts, etc.). Continue to provide value, leveraging unique content.
- **AMs and CSMs** will prioritize their follow up based on engagement indicators coming from the campaign, leveraging real time notifications coming from Folloze.

Customer Success

Cisco - Upsell and Tech Refresh

For networking giant Cisco, Folloze helped give birth to a very successful rhythm campaign refreshing "end-of-life" equipment. An end-of-life conversation with a customer is never easy. The customer doesn't necessarily have a good reason to upgrade, but the vendor has an obvious incentive to upgrade the customer, both from a revenue stream and support point of view. Cisco made it easier for the sellers by, first, provide them with a dashboard, on a Folloze board, of their accounts that are candidates for refresh. Second, they provided the sellers with a content package that highlights the value they can derive from upgrading. This campaign created a 7 figure pipeline and started a new era of customer engagement at Cisco.

Customer Success

Microsoft and Autodesk: Internal Advocacy Campaigns

Both Autodesk and Microsoft leveraged champions within their customer accounts to help disseminate content internally. They took advantage of the trusted advisor status of these champions among their peers. Both accounts significantly increased their account coverage scores as an initial result, expanding the reach and building lists of new contacts. More importantly, both Microsoft and Autodesk were able to demonstrate contribution to pipeline. Want to take it a step further? Provide your champions with a Folloze login – this will allow them to update their own organization's contact emails.

Customer Success

The Online Newsletter is Reinvented: Microsoft

If you are anything like our next customer at Microsoft, you probably haven't opened a newsletter email in years, even from vendors and brands that you enjoy following. Typically those emails end up in promotions folders, and we forget they are even there. But imagine an email newsletter that is just a few lines with a link to a curated, personalized content experience. And it's being sent from my account manager, and maybe that account manager even recommends a specific piece of content because she knows it's trending right now. The chances for me to open this newsletter just became much higher -- which is the ultimate goal of the "Monthly Microsoft Highlights" campaign. And guess what, multiple opportunities were created from those newsletters.

Customer Success

Demo Days and Hackathon: Cisco

One of the great ways to advance a deal is by inviting customers to a highly targeted and hyper-personalized event. But this is also a great way to uncover expansion or cross-sell opportunities within your existing accounts. This use-case is why Cisco is inviting customers to "Test Drive" events. These are peer-to-peer events (in their case, engineer-to-engineer), where sales engineers take the customers hand in hand through the transition from hardware-based networks to software-defined networks. These events enjoy over 50% requests for follow up and advanced sales conversations and are bringing Cisco 7 figure pipeline on an ongoing basis. Event invitations and event follow-ups are done using Folloze - sellers use Folloze to invite their accounts to the event. Marketers use the on-behalf motion to follow up on behalf of the SEs post-event.

Data and Infrastructure

Data in

- **Account coverage:** Depending on sales segment, account managers may own anything from a few named accounts to tens and hundreds in commercial tiers, or more if this is a territory-based segment. Ideally you want each account to be touched at least once every two months. Build your ongoing rhythm by segment/ region.
- **Expansion within existing buying centers:** These are your customers, you know them best - what they bought, how much they use it, what stage of maturity they are. This is a play where data is extremely in your favor, allowing you to segment very accurately. At some accounts it's about promoting usage, at others it's about upselling or cross-selling a different product.
- **Expansion across buying centers:** Leverage customer success in some areas to communicate with other business units not in touch yet. It's important to map those and create specific Engagement Rhythms® for these contacts, using the same plays as in ATTRACT and ENGAGE.

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Thank you!

To learn more, visit
www.folloze.com