



A Comprehensive Guide for **Account-Based Everything**



Account-based selling has been around for a while, but only recently has the practice, Account-based Everything (ABE) started to gain traction.

According to Forbes, over **80%** of B2B organizations have been actively using the ABM model (as of 2019). But 2020 has made everyone question the existing account-based practices. Thus emerged the ABE concept, a pivotal shift from siloed account-based selling to coordinated teams and processes, hyper-personalization, and proactive account management. The goal of ABE is to create a coordinated effort across the entire organization to win, serve, and retain target accounts.

In case you haven't already adopted this practice for your organization or are wondering how to make the best out of your Account-based efforts, this is the comprehensive guide you will ever need for Account-based Anything and Everything.

It is not a one-time initiative but an ongoing process within your organization's culture.

It is about creating new processes, training your teams continuously, and planning out how you will effectively execute this strategy moving forward.

It is a never-ending cycle of getting to know your accounts better, identifying their needs and pain points, and creating personalized experiences through every funnel stage to drive the sale. Thus it helps you focus your efforts on accounts that are most likely to purchase from you and maximizes the value of each sale by ensuring every sales opportunity has a clear plan until the deal is closed.

What is Account-Based Everything?

[Gartner](#) defines Account-based Everything as "the coordination of personalized marketing, sales development, sales, and customer success efforts to drive engagement with, and conversion of, a targeted set of accounts. The principal focus is driving the full lifecycle revenue chain from marketing through sales and customer success/account management."

The purpose of Account-based Everything is to build long-term relationships with key accounts that result in increased sales and exceptional customer experience. By taking a holistic and tailored approach to each account, Account-based Everything provides a unique advantage that traditional sales methods cannot match.

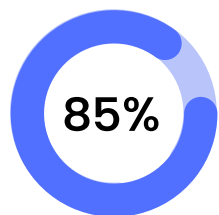


Why is Account-Based Everything different from the Traditional Sales Model?

The traditional sales approach focuses on creating and closing sales with a general audience without carefully considering potential customers' specific needs or wants. Account-based Everything focuses on targeting the right accounts at the right time with the right approach to increase the likelihood of a sale through experience-driven sales strategies.

In essence, Account-based Everything is a more customized and data-driven approach to selling that allows you to zero in on accounts with the highest likelihood of purchasing from your business.

Unlike traditional sales methods, ABE is not a closed-loop model. It is not a quick fix. Instead, it is a long-term strategy that requires exceptional organizational alignment, planning, patience, and meticulous attention. That is why the probability of success is high in an Account-based model.



As a matter of fact, over [85%](#) of customers expect a cohesive and uniform experience throughout their buyer journey.

Furthermore, in a [2022 Salesforce Survey](#), 88% of buyers agreed that buyer experience is as important as the product or service itself, reiterating the significance of building experience-driven sales practices.

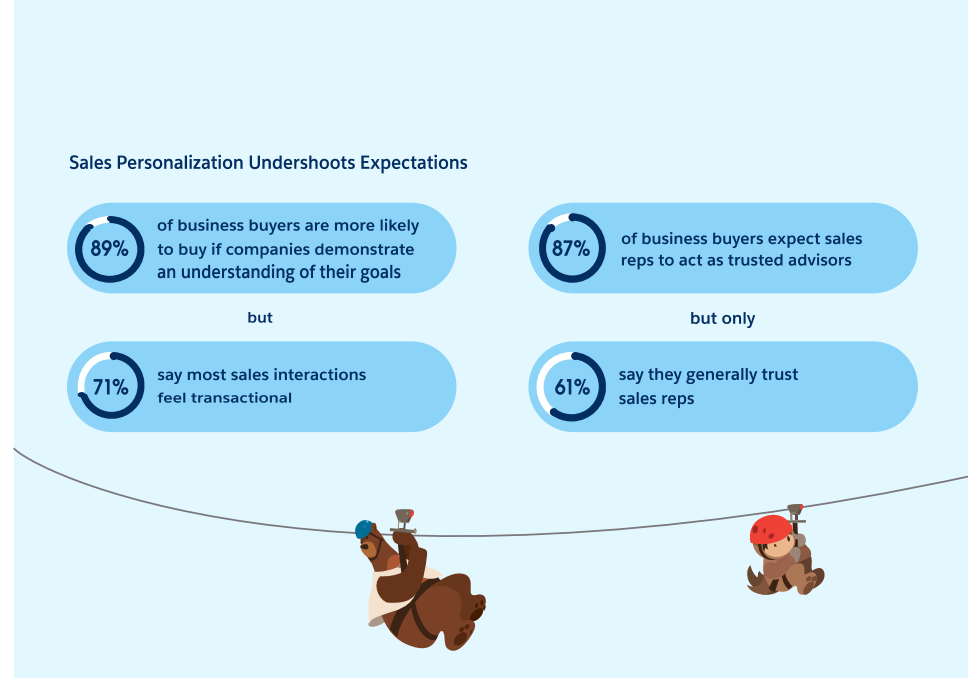
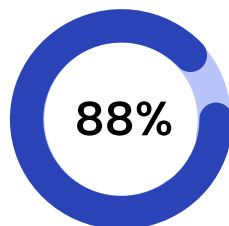


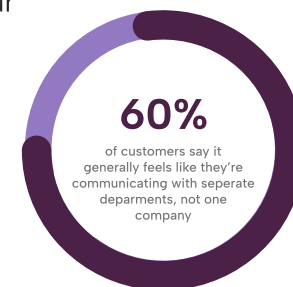
Image Source: Salesforce State of the Connected Customer Report, 2022.

Common Challenges of Account-Based Everything:

Lack of Organizational Alignment

Account-based Everything is a cross-functional exercise. It requires real-time coordination between multiple teams like marketing, sales, revenue operations, account management, and customer success to ensure everyone is focused on the target account.

The lack of alignment between teams leads to chaos and the risk of duplicated efforts, which disturbs your buyer journey's linearity and customer experience. Hence, it results in poor customer experience, and prospects tend to drop midway through your funnel. Therefore, cross-functional alignment is crucial to ensure each account is on the right path in its buyer journey.



60% of customers say it generally feels like they're communicating with separate departments, not one company

Image Source: Salesforce State of the Connected Customer Report, 2022.

Rising Expectations for Consistency Remain Unmet

Customers Who Say the Following

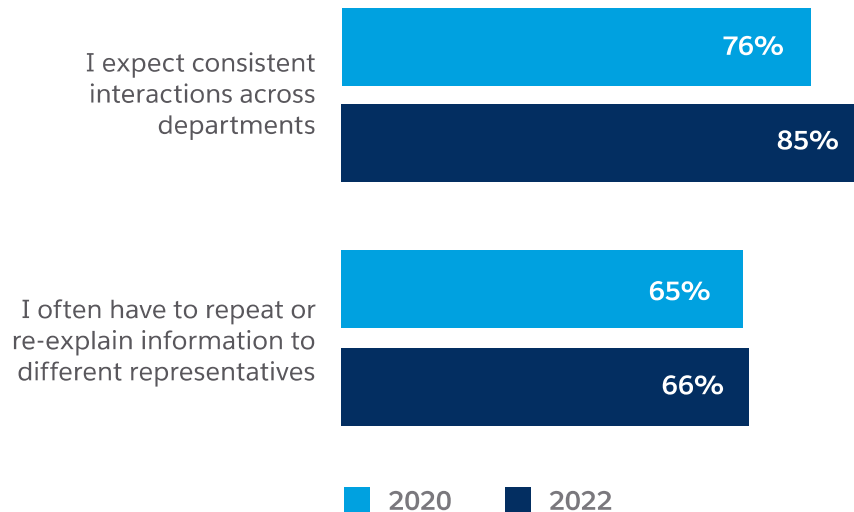


Image Source: Salesforce State of the Connected Customer Report, 2022.

Poorly defined Rules of Engagement

Rules of Engagement is a clearly defined documentation of fundamental rules created to appropriately engage with target accounts throughout the prospect-to-customer lifecycle in all possible and delicate situations to close the deal. It involves various aspects like account ownership, teams handling the account, account handoff, account intelligence, stakeholders' roles, and coordination between teams. There are a lot of moving parts in Account-based models – numerous touch points, high-frequency outreach, and multiple stakeholders – which often leads to confusion. That is why in the absence of clearly defined Rules of Engagement:



Your pipeline is a chaotic mess



The ownership of accounts will be confusing



It is difficult to know where your prospect is in their buyer journey



No one has a clear view of what is happening in your target account



Difficult to determine who is responsible for what



There is a risk of conflict of interest between teams



There are too many stakeholders, and no one knows what exactly is happening



Siloed sales process where no one knows who is handling an account

When it comes to Account-based Everything, clearly understanding and defining everyone's roles and responsibilities is crucial to avoid potential team conflicts and mismanagement of accounts. This will ensure that everyone is on the same page and that every account is managed effectively.

Account Ownership

The ownership of every account inevitably changes hands as your accounts move down the sales funnel. So, it is essential to have a standard rule of thumb for how and when the account ownership changes. Doing so can avoid confusion and friction in your sales process. For example, having a thorough understanding of your team member's roles and responsibilities help you understand how and when the account ownership changes.

- The account manager is responsible for overall account strategy and execution. They are the ones who develop relationships with key decision-makers within the target account and work to create a consensus around the need for the product or service being offered.
- The sales development representative's (SDR) role is to generate new leads and opportunities within the target accounts. In addition, they work closely with the account manager to ensure that the right leads are being worked.
- The sales engineer's (SE) role is to provide technical expertise and support during the sales process. In addition, they work with the account manager and SDR to identify potential roadblocks and help create custom solutions for the target accounts.
- The customer success manager (CSM) is responsible for post-sale customer onboarding and success. They work with the account manager to ensure that the customer can get the most out of the product or service and continue using it long-term.

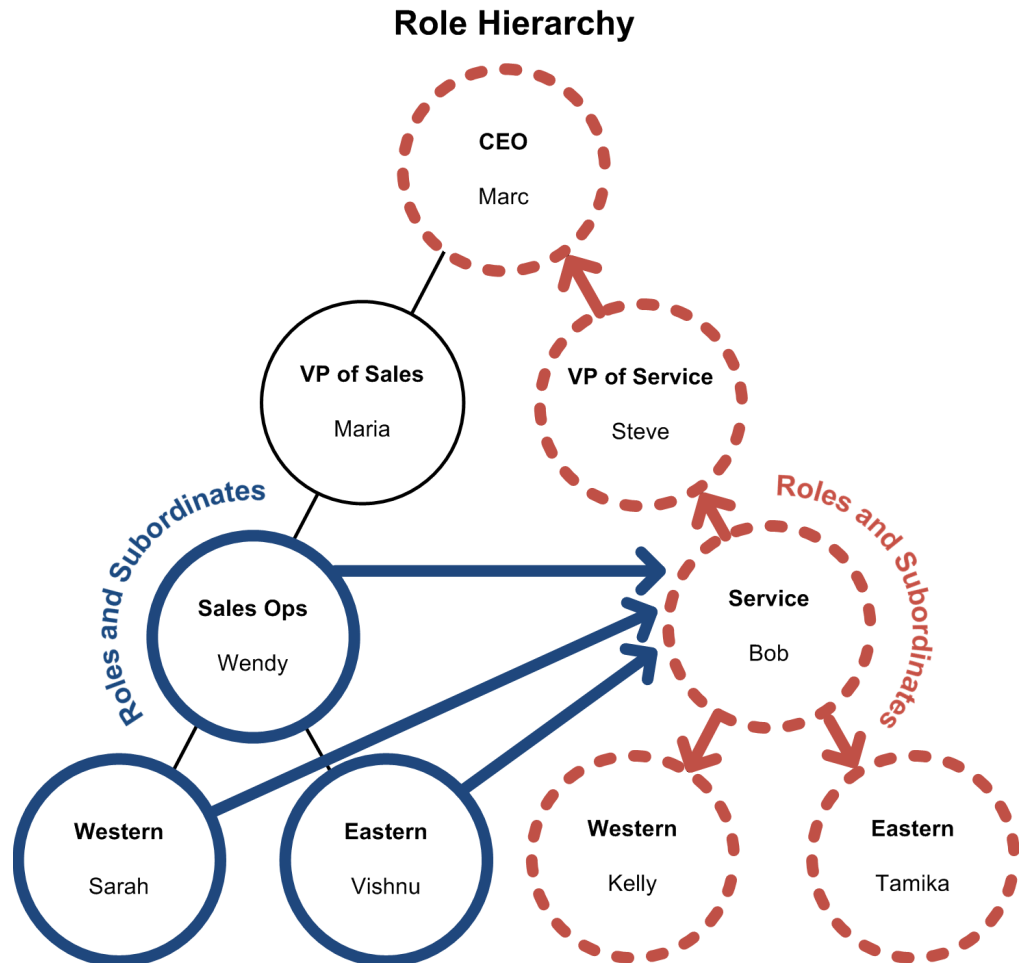


Image Source: Salesforce, Blog – Behind the Scenes of Record Ownership in Salesforce

Account Handoff

As mentioned above, accounts tend to change hands throughout their buyer journey. It means each account is handed off to a different team at every stage. One wrong handoff is enough to ruin a potential deal. Hence, defining a standard rule of thumb for prospect handoff is crucial. It avoids friction in your sales process and buyer journey, ensuring a positive customer experience.

	Initiatives	Contact
Targets	Increase collaboration between marketing and sales.	Andrija Yannick Analytics Manager Anniken Tove Analytics Manager
Decision makers	Company wide cloud initiative.	Wobbe Tora COO Andrea Dajana Data Scientist
Executive sponsors	Leadership wants deeper visibility into key projects and initiatives across each team.	Raven Carlos Director Analytics Wobbe Tora COO
Blockers	Standardize Operating Systems (OS) across the company.	Ajay Gebhard Director Intelligence Kole Yoshi Data Scientist

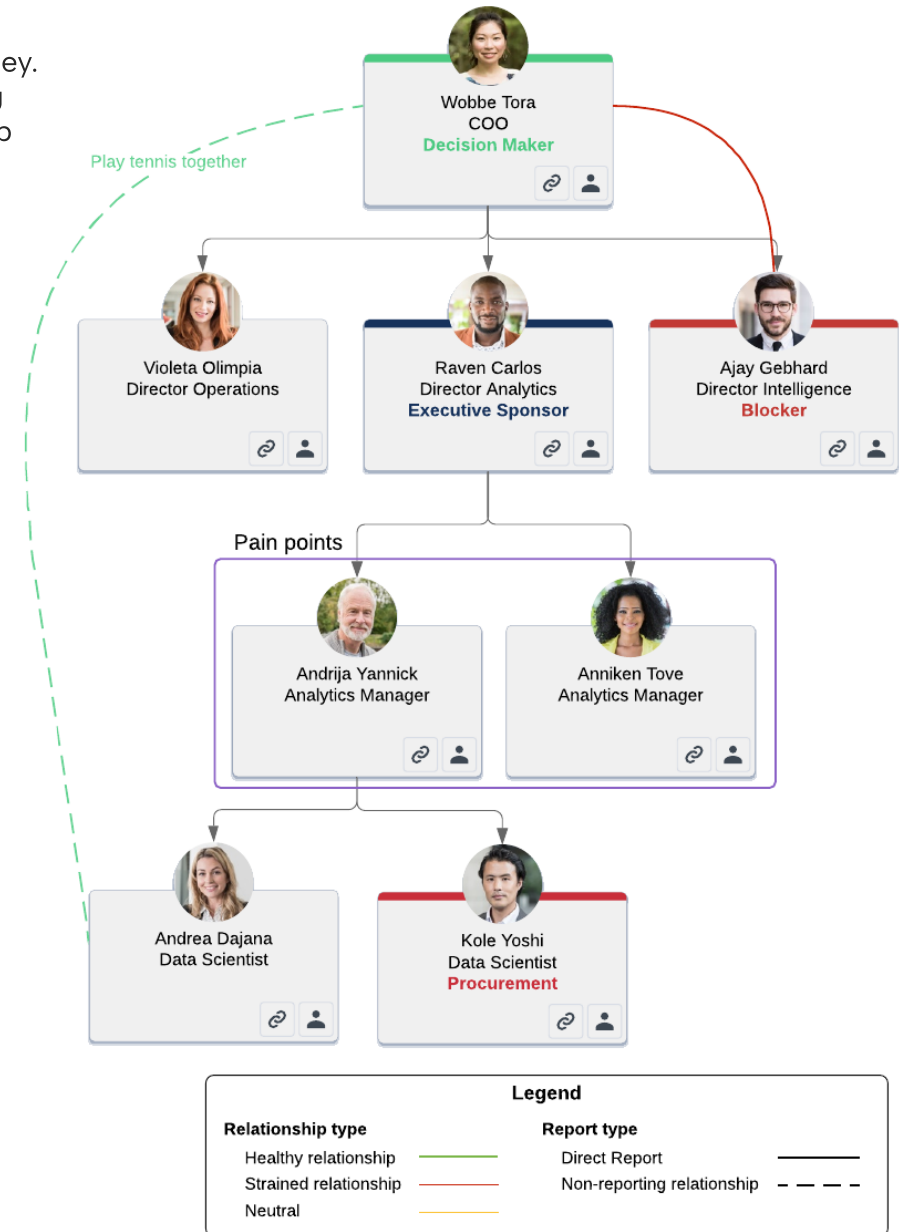


Image Source: LucidChart, Blog – How to improve the customer handoff process

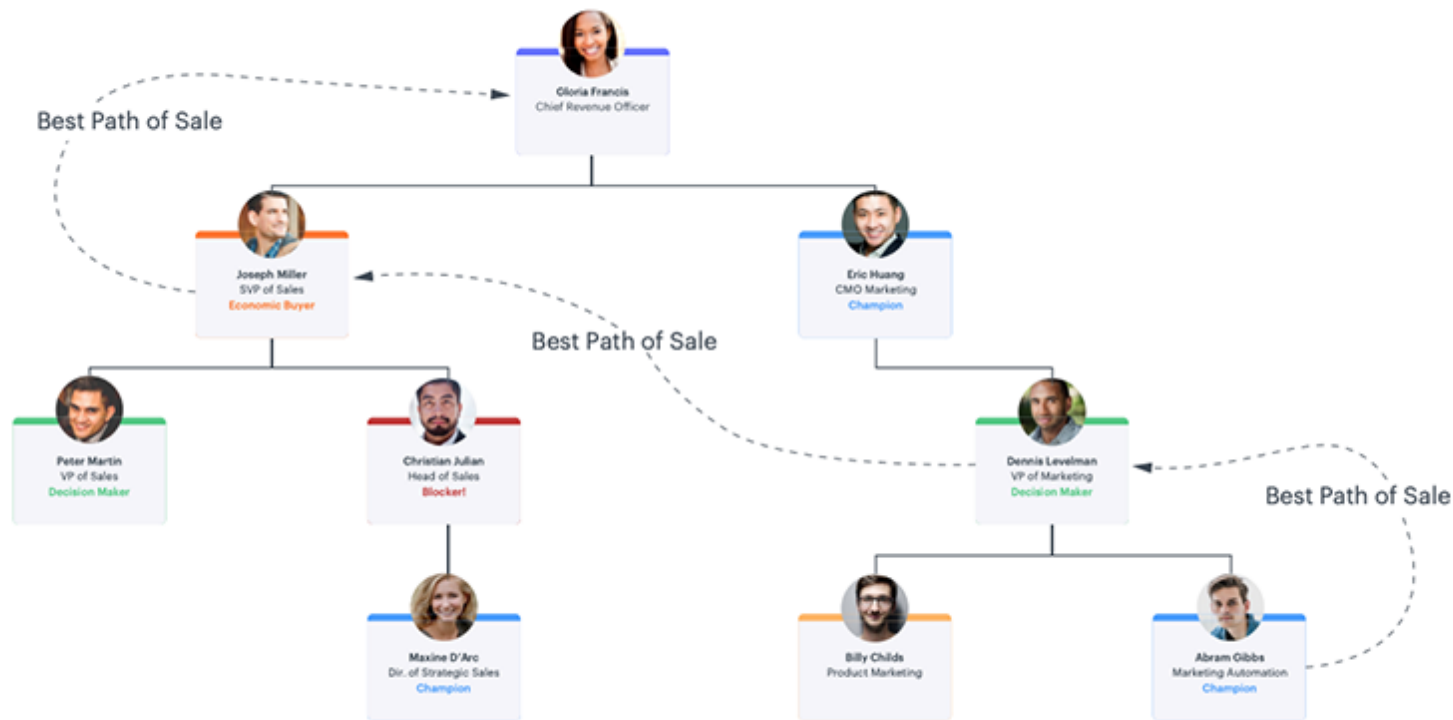
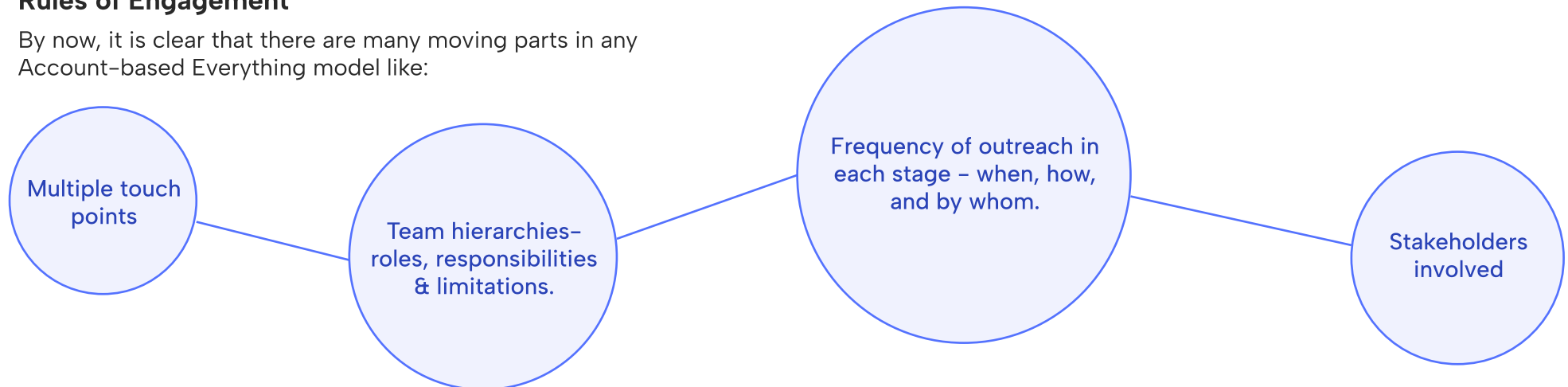


Image Source: Close, Blog – Account Mapping: Why You Need to Chart Prospect Companies

Rules of Engagement

By now, it is clear that there are many moving parts in any Account-based Everything model like:



Although the probability of uncertainty cannot be ruled out altogether, clearly defined rules of engagement in a playbook with different scenarios and delicate situations help the teams easily walk the tightrope.

70% of customers say connected processes – such as seamless handoffs or contextualized engagement based on earlier interactions –are very important to winning their businesses



What is Playbook?

A **Playbook** is a guide that outlines all the steps involved in the Account-based Selling process with all possible scenarios and how to deal with them. Having a playbook ensures cross-functional alignment, internal team coordination and avoids conflicts because everyone knows exactly what to do in every situation, making the entire process run without any friction.

Creating a playbook may seem like a daunting task, but it doesn't have to be. Start by outlining all of the steps involved in your account-based selling process and any possible scenarios that could arise. Then, involve all the teams to create a plan for each scenario to avoid conflict of interest in the later stages. Once you have Everything in place, circulate it across the teams to ensure it is fool-proof.

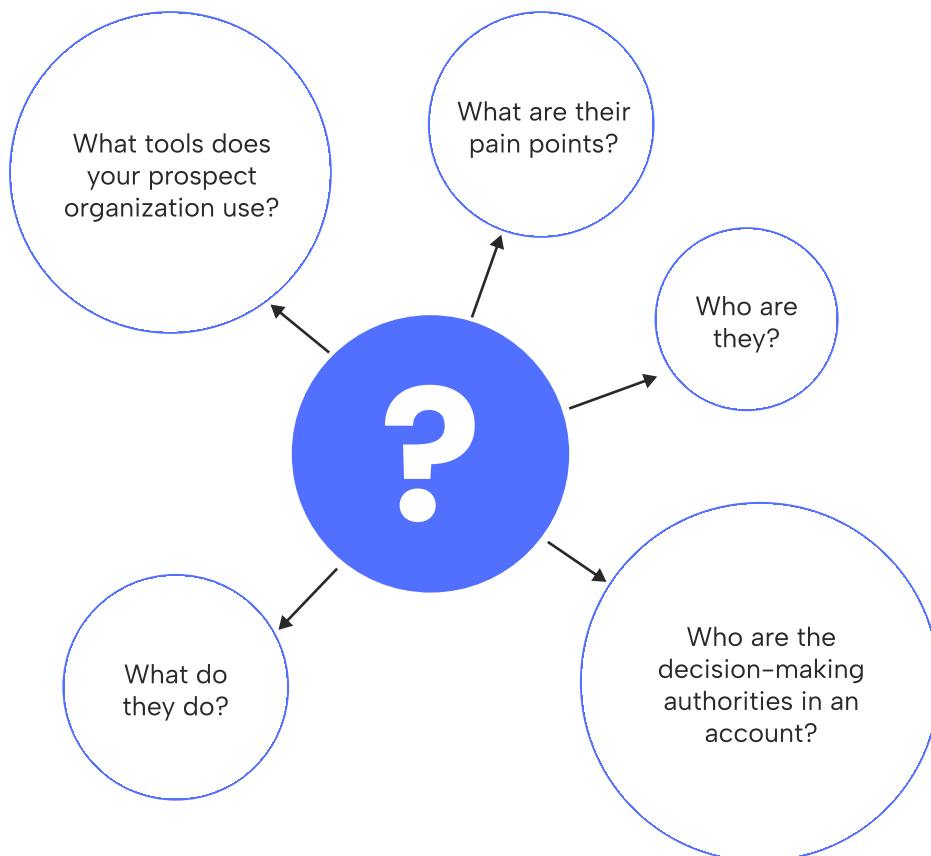
Here is an example template of the Account-based Everything Playbook:

- 01** First, define target accounts – define the ICP of typical personas in your target accounts
- 02** Teams involved – their roles and responsibilities
- 03** Engagement strategy – period of engagement, collaterals needed at each stage, frequency of outreach
- 04** How to keep different teams aligned throughout the process?

Lack of Prior Planning and Strategy

There are many moving parts in an Account-based Everything model. You are more likely to exhaust your resources and energy without a prior strategic plan. Because ABE is all about having a plan and being very intentional in your outreach and engagement with targeted accounts. Without adequate planning and focus, you will simply be spinning your wheels and wasting time and resources.

So, what does it take to be successful with ABE? First and foremost, you need to have a clear understanding of your target accounts.



Once you have a good grasp on these, you can begin to develop a plan for how you will reach out and engage with these accounts. This plan should include both online and offline outreach methods. For example, you might consider sending personalized emails, LinkedIn messages, or even making phone calls to key decision-makers within your target accounts. You might also want to consider attending relevant events your target accounts are likely to attend.

Whatever outreach methods you choose, the most important thing is to be strategic and intentional in your approach. By taking the time to develop a plan and put forth a focused effort, you will be much more likely to see success with your Account-based Everything initiative.

Operational Bottlenecks

By now, it is evident that Account-based Anything is quite resource-intensive and requires a lot of attention. It takes dedicated teams, coordinated efforts, and fool-proof processes to drive every account on the path to success. All of this is overwhelming, even for a single account. So then, the biggest challenge is implementing it at scale.

As you add more target accounts, it becomes increasingly difficult to maintain the same level of quality and personalization. This can lead to operational bottlenecks and decreased success rates. But with the right tools, resources, and intelligent automation at different stages, you can ensure efficiency. Here are some operational challenges that affect your Account-based Everything process:

1. Account Handoffs

One of the most common operational bottlenecks in any Account-based model is the account handoff between different teams. Account handoff is an inevitable part of a sales funnel. Different teams come into the picture as your accounts move down the sales funnel. Therefore, enabling seamless account handoff is essential to drive sales.

For example, marketing teams often generate leads, while sales teams focus on closing deals. If the sales team is not updated on the latest marketing initiatives, they will be disadvantaged when trying to engage with decision-makers at target accounts. These diverging goals can lead to conflicts and miscommunication between the two teams. It is a bigger challenge when more than two teams are involved in the process.

The account handoff must be executed smoothly when a deal moves from one stage to the next in the sales process. The account owner must have a clear understanding of the status of the deal and the next steps in the process. They must also be able to articulate the value proposition of the product or service and how it addresses the needs of the decision-makers at the target account.

To overcome this obstacle, aligning the goals of all the teams around a shared definition of handoff is essential. Once you have done this, you can start building a process for how leads will be handed off from marketing to sales and sales to customer success.

The challenges of account handoff can be compounded when multiple decision-makers are involved in the purchase decision. The sales team must clearly understand the prospect organization's decision-making process in these cases. In addition, they must be able to map out the key influencers and decision-makers and their respective roles in the purchase decision.

2. Data Management

It is no secret that data management is the most common operational challenge in any sales process. Keeping track of customer interactions can be daunting for even the most experienced sales teams. Unfortunately, accurate account handoff is just one piece of the puzzle because every account contains valuable information and data that the new owner may not be familiar with. Additionally, the account may have been established over a long period, and the new owner may not have the same level of experience or knowledge about the account.

This can make it difficult for the new owner to take over the account and manage it effectively and successfully.

Sales teams are under pressure to close deals and meet quotas. In any Account-based model, this pressure is amplified by the need to establish and maintain relationships with key decision-makers at target accounts. The challenges of account handoff can trip up even the most experienced sales teams, especially in the absence of adequate data to complement their efforts.



To overcome these challenges, it is important to have a clear and concise data handoff process in place. This process should be designed to automatically transfer all of the necessary information and data from the old owner to the new owner, along with account handoff. Additionally, the process should be designed to help the new owner understand the account and its history. This will help them more successfully manage the account and achieve its objectives.

Sounds overwhelming?

Data management doesn't have to be a nightmare with the right tools and processes.

Here are four tips to help you streamline your data management process and keep your Account-based Everything model running like a well-oiled machine

Create a central repository of Account Intelligence:

A central repository is a critical component of any effective data management strategy. By housing all data in one place, all your teams can easily track and manage customer interactions, funnel stage, and account status.

Automate data entry wherever possible:

Data entry is one of data management's most time-consuming and error-prone aspects. By automating data entry wherever possible, you can free up your team's time to focus on more critical tasks.

Use data visualization tools to make sense of complex data sets:

Data visualization tools can be valuable in making sense of complex data sets. Using visual aids, you can more easily identify patterns and trends that would otherwise be hidden in a sea of numbers. This will ultimately help you make better decisions when it comes to managing your customer data.

Invest in a quality data management solution:

Investing in a quality data management solution is one of the best ways to streamline your data management process. A quality data management solution will make it easy to keep track of customer data, automate data entry, and use data visualization tools to make sense of complex data sets.

But remember, finding the right tools and processes for your unique needs is the key to success. So be sure to research and invest in a quality data management solution that will help you take your account-based model to the next level.

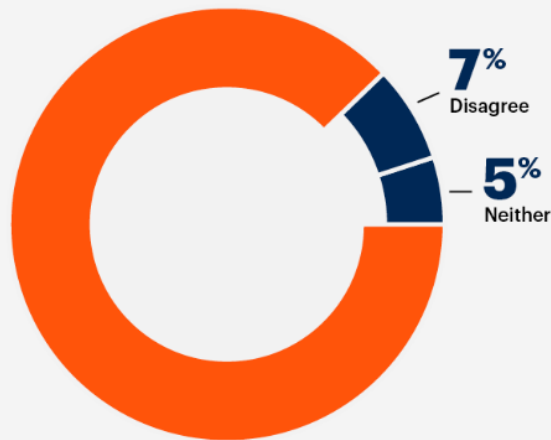
3. Account Management

Another common challenge for the majority of sales organizations is managing accounts. Each account has its own specific needs and requirements, and all teams concerned should have a clear understanding of the account's buying process and the unique needs of the individuals within the account.

An effective account management strategy will ensure that all teams are aligned with the account's objectives and can provide the necessary support throughout the buyer's journey. Additionally, an account manager needs to be able to build and maintain relationships with key decision-makers within the account.

88%

of account managers agree that servicing accounts above and beyond customer expectations is the surest way to grow.



n = 670
Source: Gartner
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Gartner

So how can you effectively manage change in an ABE model?

Here are four key tips:

01 Communicate early and often

The first step is to ensure that everyone involved in the ABE model (sales, marketing, revenue, product, etc.) is aware of all changes. This sounds like a no-brainer, but it is often overlooked in the heat of the moment.

Make sure you have a clear communication plan, so everyone knows who to contact and when. And don't forget to over-communicate; it is better to err on the side of too much information than too little. But try not to lose focus on what is in front of you.

02 Get buy-in from all stakeholders

Once you have communicated the change, getting buy-in from all stakeholders is important. This includes not only the sales team but also marketing, product, revenue, and any other functions that will be impacted.

The best way to do this is to involve everyone in decision-making. That way, there is a shared sense of ownership and responsibility for the change.

4. Change Management

Change is the only constant in sales, but it is especially prevalent in Account-based Everything. That is because ABE relies on a coordinated, cross-functional approach that requires tight alignment between sales, marketing, revenue, and product teams. As a result, one small change or update in any team has a ripple effect across the entire organization.

That is why change management is so important in ABE. It is not enough to just have a plan for how to deal with changes; you need to be proactive in anticipating them and ensuring that everyone is equipped to act individually and in a coordinated manner in times of uncertainty. Otherwise, you risk sales productivity, and your ABE model starts to break down.

03 Create a detailed plan

Once you have buy-in from all stakeholders, it is time to create a detailed plan for how the change will be implemented. This should include a timeline, assigned roles and responsibilities, and clear success metrics. The more specific and actionable the plan, the better. That way, there is no ambiguity about what needs to be done and when.

04 Execute and monitor the plan

Finally, it is time to execute the plan. It is important to make sure that Everything is carried out as planned. Monitoring the plan is also critical. This will help you identify any problems or challenges and adjust as needed.

This means there should be a high level of communication and coordination between the teams. Finally, you must ensure that each team is adequately incentivized for success.

This means that they should have realistic quotas and commission structures that align with the goals of the account-based selling model. By following these tips, you can be sure that your teams are structured for success in any sales model.

Create playbooks

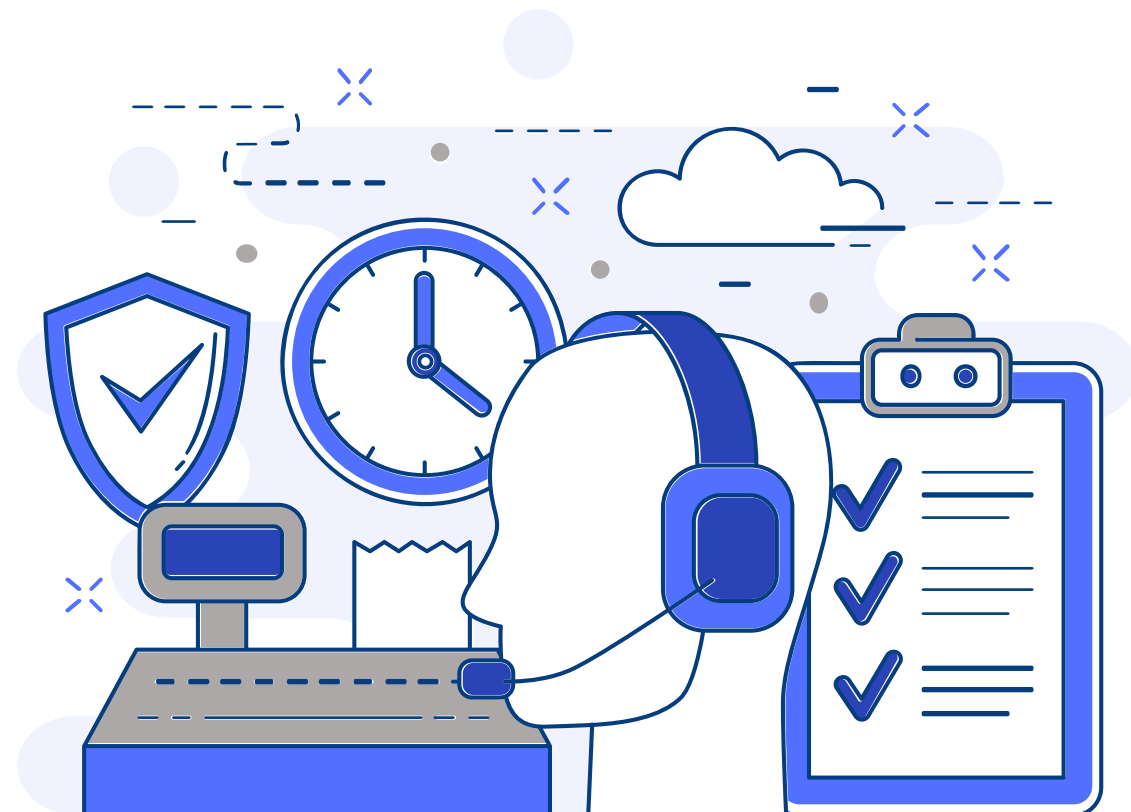
Whether you are looking to implement an account-based model for the first time, or just trying to fine-tune your existing process, creating a playbook is a great way to get everyone on the same page. Here's how to create a playbook for all teams that will help make sure your account-based efforts are successful.

How to overcome these challenges

How to structure teams for ABE?

If you are looking to structure your sales, marketing, and account management teams for an account-based selling sales model, there are a few things you need to keep in mind. First, you must ensure that each team is laser-focused on targeted accounts.

This means they should have a deep understanding of the needs and wants of those accounts. Second, you must ensure that each team works collaboratively to support the other.



1. Define Your Ideal Customer Profile

The first step in creating your playbook is to define your ideal customer profile. It helps you determine who you should be targeting and why. Once you have a good idea of your ideal customer, you can start building your target account list.

Define your target accounts. This could be based on factors like company size, industry, or location.

- There are a few key elements to consider when defining your ICP.
- Company size: ABS is most effective for enterprise-level companies, so your ICP should be a large organization with a complex sales cycle.
- Industry: What industries are your target customers in? Consider both vertical and horizontal markets.
- Location: Are there any geographic restrictions you need to consider?
- Purchase history: What is the company's history of purchasing similar products or services?
- Budget: What is the company's budget for this type of purchase?
- Decision-makers: Who are the key decision-makers within the target account?

Create a list of contacts at each target account. This could come from your own CRM data, public sources like LinkedIn, or good old-fashioned research.

2. Create a Process for Engagement

Most companies today use a traditional "spray and pray" approach to sales and marketing, trying to reach as many potential customers as possible with their message in the hope that something will stick. But this isn't an effective way to sell anymore, especially when trying to target large, complex organizations.

Instead, you need to take an account-based approach, where you focus your efforts on specific accounts that are more likely to be interested in what you are selling. This means you need to research and learn as much as possible about each account to tailor your sales approach, ensuring that you are addressing their most pressing concerns and offering something truly valuable.

It is not enough to target the correct accounts, though – you also need to ensure you are reaching the right people within those accounts. The decision-makers in large organizations often differ from those who would be interested in your product or service, so you need to find a way to reach them. This might mean working with influencers or third-party partners or sending them personalized messages.

To do this effectively, you need to use a variety of resources, including:

- **Their website:** Take a close look at their website and see what language they use to describe their needs and pain points. This can give you valuable insight into how they think about their problem and what they are looking for in a solution.
- **Online forums and social media:** See what people say about your prospect on social media and online forums. This can be a great way to learn about their pain points and the kinds of solutions they are already considering.
- **Secondary research:** In addition to primary research (like talking to your prospect directly), secondary research can be beneficial in understanding their needs and pain points. This includes reading industry reports, analysts' notes, and trade publications.

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3. Develop Key Messages and Personalized Content

Once you understand your prospect's needs and pain points, it is time to start tailoring your sales approach. This means creating customized sales materials, messages, and pitches to address their unique needs. You should also create personalized content that speaks to the specific needs of your target accounts. This could include blog posts, infographics, eBooks, and more.

- Develop targeted content and messaging for each account. This could be in the form of sales collateral, website content, or even just custom email templates.
- Reach out to contacts at each target account. This could be through direct outreach, online advertising etc.
- Measure your success. Keep track of your progress with metrics like account penetration rate, deal size, and win rate.

To do this effectively, you need to use a variety of sales tools and resources, including:

- **Sales intelligence:** Use sales intelligence tools to help you gather information about your prospect's specific situation. This can include things like their business size, industry, and location.
- **Sales enablement:** Use sales enablement tools to help you create customized sales materials, such as pitch decks and product sheets. This will make it easier for you to tailor your sales approach and ensure that you provide the right information at the right time.
- **Account-based marketing:** Use account-based marketing tools and resources to help you reach out to your prospects with targeted messages and offers. This can include targeted ads, personalized emails, and direct mail.

4. Set Up Tracking and Reporting

You need to build a system that can scale. This means creating repeatable processes and templates that your entire team can easily follow.

That is why tracking and monitoring all your account-based activities is important.

This will help you measure the success of your processes. You should also create reports showing how your account-based efforts perform against your goals. It helps you fine-tune your process and ensure that you are consistently meeting your customer's needs.

Here are 4 key metrics you can use to measure the success of your Account-based Everything:



Number of target accounts: This is the number of potential customers you have identified as a good fit for your product or service.



Win rate: This is the percentage of target accounts you can successfully close deals with.



Average deal size: This is the average amount of money each deal is worth.



Lifetime value of a customer: This is the total amount of money a customer is expected to spend with you over their lifetime.

4 Key Principles of Account-Based Everything

Intelligence-driven:

Data is foundational to the success of any Account-based initiative. You can't identify your ideal target accounts without accurate and up-to-date data or understanding their specific needs. Data is the foundation upon which you will build your Account-based Everything strategy.

That is why a data-driven approach is essential to success. By understanding which accounts are most likely to convert, you can focus your attention and resources on the accounts that matter most. And by using data to segment and personalize your outreach, you can ensure that each account receives the attention it deserves, the tailored content and messages they are most likely to respond to.

Strategic Orchestration:

A successful Account-based Everything requires strategic orchestration of the entire process from start to end. This means aligning your sales, marketing, revenue, and service teams around a shared goal of providing an exceptional experience for your target accounts.

By taking a holistic approach to account management, you can ensure that each stage of the customer journey is carefully considered and executed. This starts with account selection, where you identify which accounts are most likely to generate the greatest return on investment. Once you have your target list of accounts, you must develop a personalized approach for each. This includes creating targeted content and campaigns that address the specific needs of each account.

Your sales team also needs to be highly trained on the products and services you offer and the unique needs of each target account. In addition, they should be able to effectively communicate your value proposition and build relationships with key decision-makers within each organization.

Finally, your service team must be prepared to deliver exceptional support throughout the customer lifecycle. This includes proactively addressing issues and ensuring a seamless transition to new products or services.

Taking a strategic and coordinated approach to account management can ensure that your target accounts receive the best possible experience until the deal is closed. This will result in higher customer satisfaction, loyalty, and retention rates, as well as increased sales and revenue.

Aligned Teams & Unified Efforts:

Every team needs to clearly understand what the other teams are doing to avoid duplication of effort or confusion. When all teams are aligned, it allows for a more streamlined and cohesive approach. This means that each team is aware of the other teams' goals and objectives and can work together to support each other. It also allows for better team communication, which can help resolve any issues.

Account-based Everything is a complex strategy, and it takes a lot of coordination to be successful. However, the benefits of having all teams aligned are well worth the effort. By working together, all teams can focus on individual goals while supporting the overall strategy. This will lead to a more successful Account-based Everything approach and, ultimately, better results for the business.

Creating a system that allows communication and collaboration between all teams are also essential. This will ensure everyone is on the same page and can offer support or advice whenever required.

Personalized Experience:

Personalization is what differentiates Account-based models from the traditional sales model. The reason is simple: when you personalize the experience for your target accounts, they are more likely to engage with your brand.

Think about it from their perspective: if they see that you have taken the time to understand their specific needs and tailor your offering accordingly, they will likely want to work with you. On the other hand, if they feel that you are just trying to sell them a generic product or service, they are much less likely to be interested.

Therefore, personalizing the experience for your target accounts significantly increases the chances of closing the deal.

Is it suitable for all industries and organizations?

Despite all the hype, the Account-based Everything model is not suitable for every organization or industry. Sometimes, it can be too resource-intensive, particularly for small businesses.

Additionally, specific industries may be more suited to other sales models, such as transaction-based or product-based selling.

When deciding whether or not to adopt an Account-based model, organizations should carefully consider their own needs and objectives. Only by taking a strategic and tailored approach will companies be able to maximize the effectiveness of their sales efforts.

However, an Account-based model can help your organization to:

- ▶ Win over larger, more complex deals
- ▶ Take a holistic and strategic approach to sales
- ▶ Target key accounts that are strategic fits

Final Thoughts

Account-based Everything is a strategy that can help increase revenue and decrease sales costs when appropriately implemented. However, it is essential to note that ABM isn't a quick fix. It takes time to implement and even longer to see results. There are many challenges associated with the account-based model, but you can also implement many strategies to overcome these challenges. With the right strategy, your sales team can increase revenue while decreasing sales costs by focusing on the correct accounts.