Rethink ABM

Reinventing the ABM playbook with generative AI

Advanced

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Workshop agenda

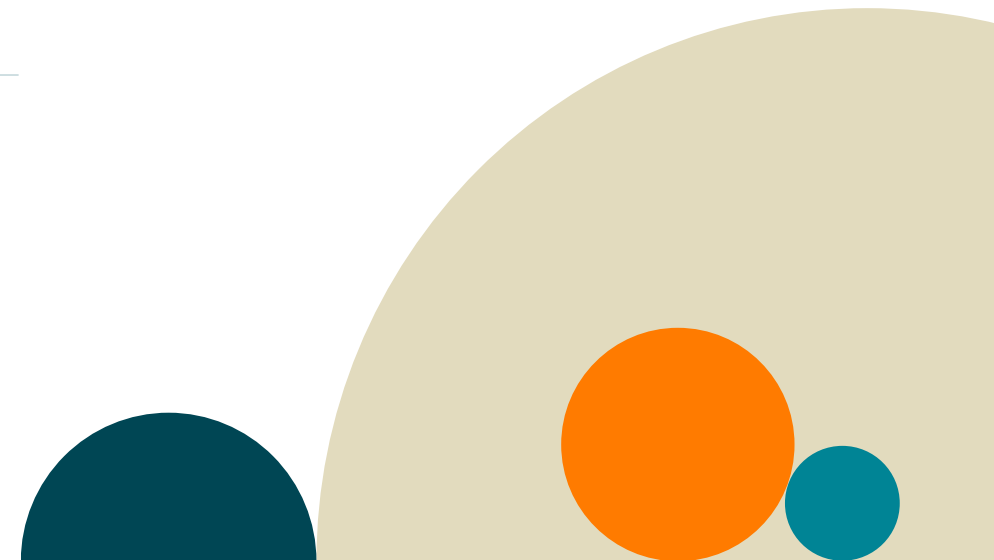| Introduction	Welcome, intros & research insights
Inspiration	Stories of integrating generative AI from Microsoft & IBM
Exercise	Generative AI use case prioritization jam

REINVENTING THE ABM PLAYBOOK

Your workshop leaders & speakers

Aaron
Bean
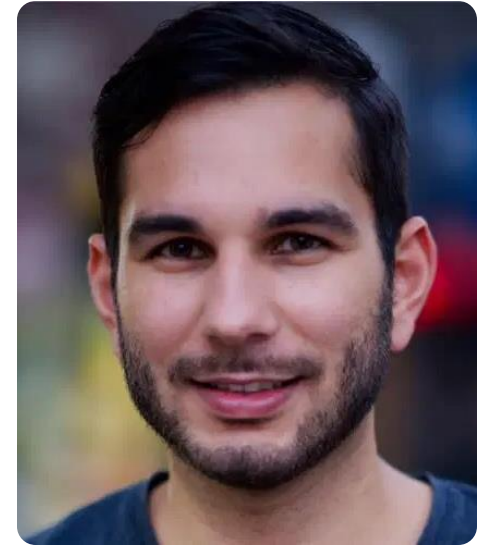
Head of Consulting, Americas

Adam
Bennington

Head of Consulting,
EMEA

Sharon
Driscoll

Account Based Marketing
Leader, IBM

Alberto
Reales

Analytics + Marketing Ops,
Americas, Microsoft

Reimagine what is possible

Data-driven insights bring new levels of precision and productivity to an age-old practice

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Companies that adopt an AI-first mindset can **imagine entirely new ways to solve problems**.

Buyers are rapidly embracing generative AI

45%

of respondents feel they are **fully leveraging** generative AI's capabilities

Mean = 3.3/5

Notes: Mean rating based on a 5-point scale where 1= just scratching the surface and 5= fully leveraging the tool's capabilities.

91%

of respondents are using generative AI in the buying process, up from 36% in November 2023

REINVENTING THE ABM PLAYBOOK

Remaining with incumbent

- Demonstrate a **deep understanding** of **my role** and **business/tech objectives**
- Publish **high-quality, relevant thought leadership**

Purchasing from a new vendor

- Demonstrate **new** and **innovative ideas** and **capabilities**
- Mitigate **high switching costs** and **integration/ compatibility** issues

REINVENTING THE ABM PLAYBOOK

Marketers are improving generative AI literacy

1.9

2023

Mean rating based on a 5-point scale where 1=Initial consideration/investigation and 5=Fully leveraging the tools/capabilities

3.1

2024

REINVENTING THE ABM PLAYBOOK

Generative AI skills and governance need support

50%

Of employees don't know when to question the results of an automated technology like AI.

65%

Agree that developing the skills and governance to deal with generative AI is challenging.

Source: Forrester Future of Work Survey 2023

Source: Forrester September 2023 AI Pulse Survey

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Overcoming key challenges to unlock ABM potential

60% of leaders say they're held back by a lack of alignment with sales and other customer-facing functions

48% of key accounts are included in ABM programs

37% of leaders are fully leveraging content personalization

73% of ABM strategies focus on buying cycles of 6-24 months (9.5 month average)

Generative AI is **about creating a business process that previously was completely impossible before.**

Elliott Young

CTO for the B2B division of Dell in EMEA

What gen AI use cases have you explored?

Join at menti.com | use code 5326 6755

Image source: Leondaro.ai

Which generative AI use cases have you explored?

Join at menti.com | use code 5326 6755

Mentimeter

| Category	Value
Predictive account scoring or selection	5
Account research or insight development	16
Account-tailored messaging	20
Account-tailored content	16
Creative development & ideation	22
Creative testing & optimization	7
AI-assisted email automation	15
Content translation or localization	13
Customer/user-facing AI chat bot	15
Internal AI marketing assistant	15
Other	6

Identify gen AI use cases with confidence

Take a pragmatic approach

- Identify "problem areas"

- Seek tangible problems that colleagues can all see

- Use a structured approach to interrogate the problems
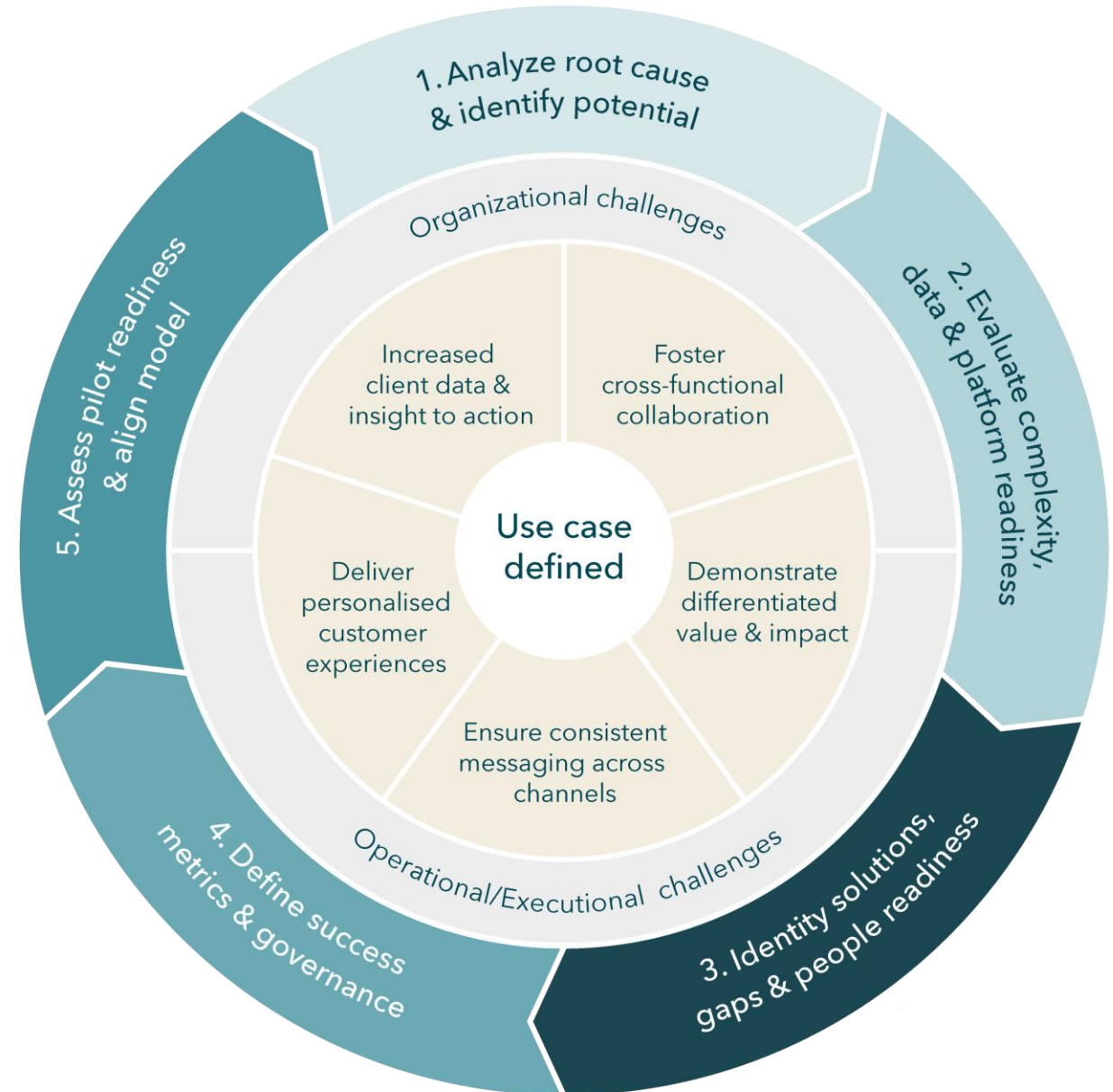
PROCESSES TO RUN

Integrate gen AI use cases into the business

POTENTIAL	PLATFORM	PEOPLE	POLICY	OPERATING MODEL
Identify and Prioritize High-Impact GenAI Use Case Territories	*Ensure Data Quality and Upgrade Infrastructure*	*Develop Change Management and Training Programs*	*Establish Ethical Policies & Compliance Framework*	*Redefine Roles and Streamline Processes*
HOW TO EXECUTE				
Workshops to ideate, aligned to goals	360 data assessment & map the data chain	Pragmatic thinking: workflows & enablement	Understand policies, prepare governance model	AI Review Board & Steerco
Evaluate & prioritize for greatest strategic value	Bring in IT early & understand what's in the locker	Communicate, collaborate, champions	Make it all measurable, reportable & alert based	Delegate for workstream optimisation

Inspiration from leaders

What is AI?

Most 'AI Models' are advanced **statistics**, like those used by banks for credit scoring or e-commerce platforms for personalized shopping, paired with an LLMs (Large Language Models).

Deterministic models:

- Operates with a defined number of variables and is bound to fixed outcomes, similar to solving a puzzle where each piece has only one correct place. It precisely predicts what will happen, assuming that every time you fit a piece correctly, the picture becomes clearer without room for guesswork.

Probabilistic models:

- Uses a combination of known variables while incorporating chance. These models aim to predict outcomes, much like guessing the result of rolling a dice or flipping a coin. A probabilistic model aims to show the likelihood that a certain scenario will happen.
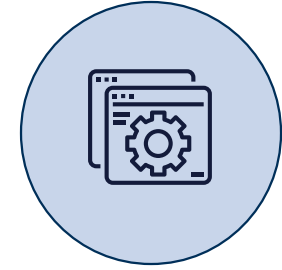
Types of Models

Multi-modal

Models produce or ingest data types beyond text, such as audio or images.
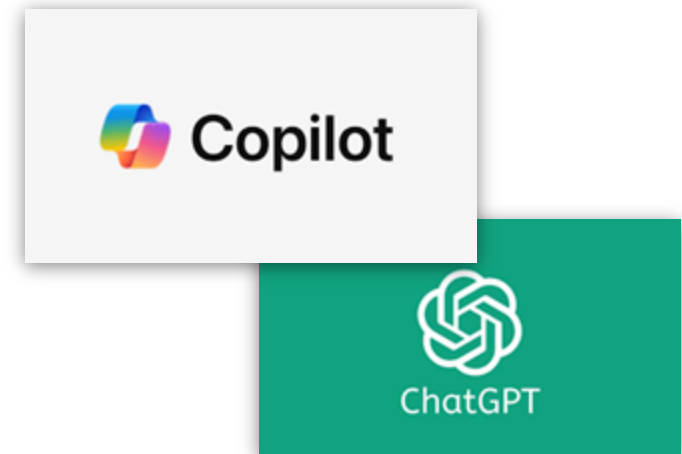

Instruction

Models designed to give instructions to software applications.

Retrieval Augmented Gen (RAG)

Models designed to retrieve 'knowledge' through reasoning.

Simple yet powerful applications today

Content Localization App

- An app that translates English documents into localized versions, addressing regional dialects while maintaining company tone.

Documentation & Upskilling Bot

- A chatbot that centralizes internal documents and processes, providing quick answers and speeding up onboarding.

Marketing Planning Copilot

- An AI tool that lets marketers query the planning platform in natural language, streamlining campaign and tactic insights.
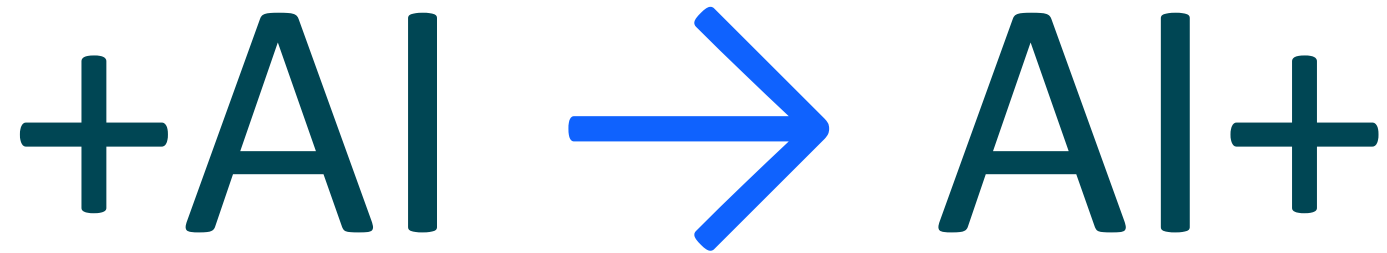
What's next?

M365 Copilot Integration

An AI-powered system that provides real-time access to emails, meetings, calendars, IMs, and internal documentation, offering seamless insights across all company data. It can answer complex, context-based questions like, "What does this acronym mean, and how is it related to the latest meeting on X?"—helping teams stay informed and make decisions faster.
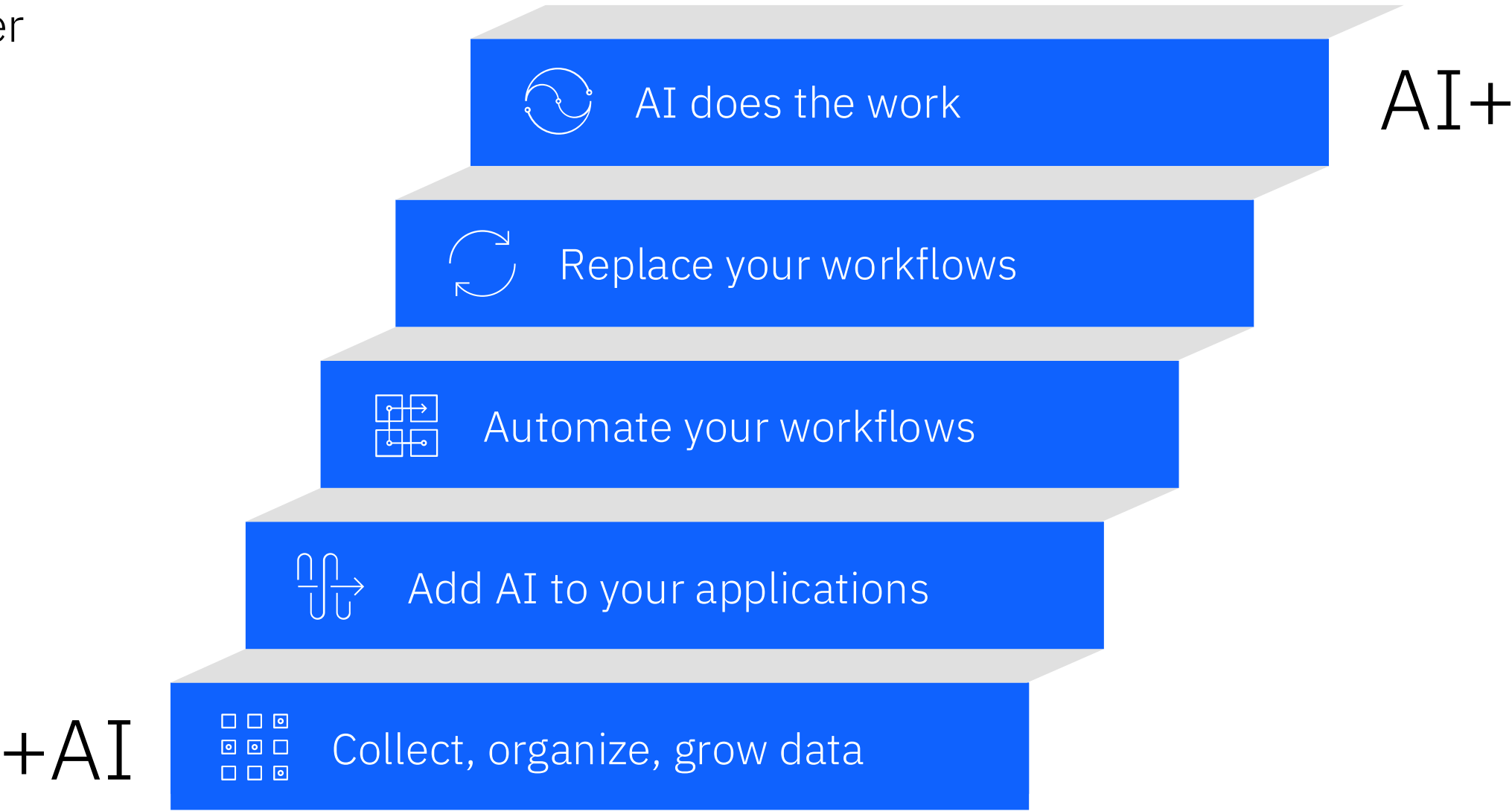
Marketing-to-Sales Connection

A sales assistant that seamlessly integrates messages and emails into an automated CRM, managing milestones and opportunities. It drafts personalized follow-up messages, sends reminders, retrieves deeper contact information, and identifies new opportunities by analyzing existing customer data, helping sales teams stay organized and proactive.

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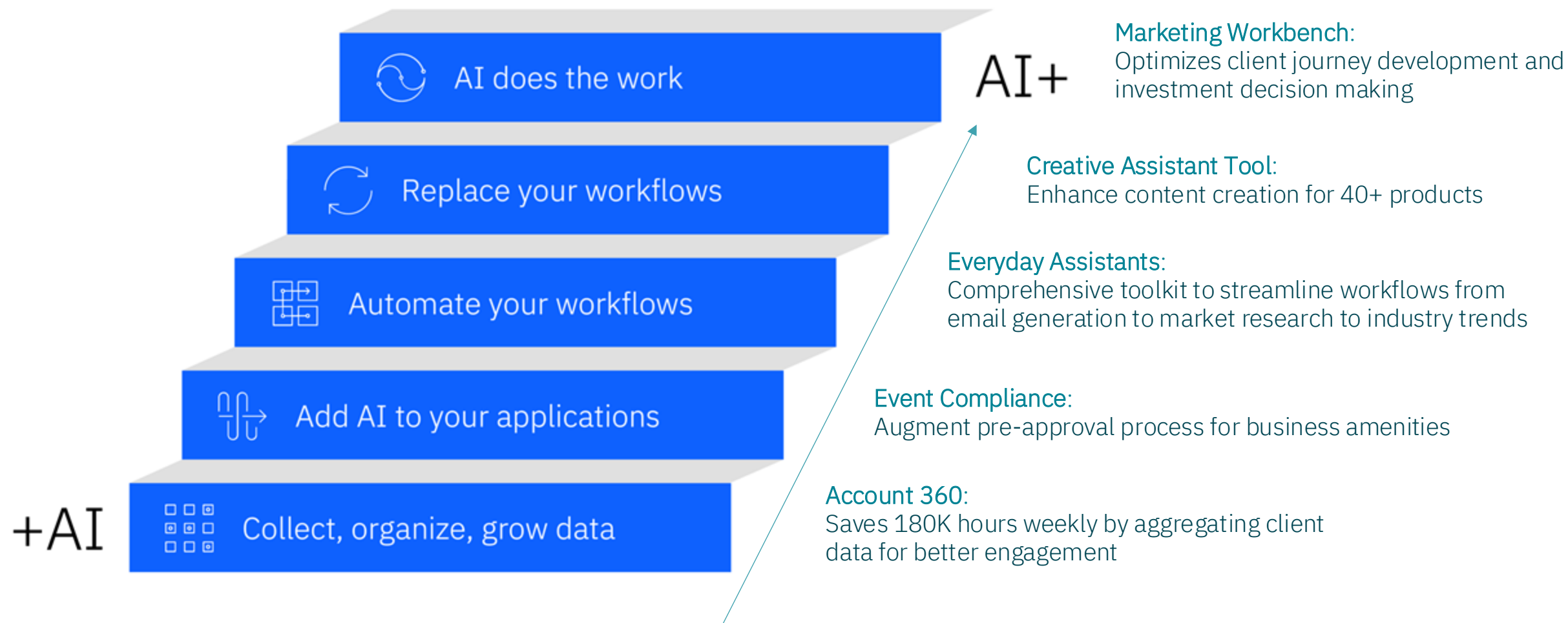
+AI → AI+

Reinventing how work gets done across business domains and industries

The modern-day AI ladder

AI does the work

Replace your workflows

Automate your workflows

Add AI to your applications

Collect, organize, grow data

AI+

+AI

Empowering marketers to create value

+AI

- AI does the work
- Replace your workflows
- Automate your workflows
- Add AI to your applications
- Collect, organize, grow data

AI+

Marketing Workbench:
Optimizes client journey development and investment decision making

Creative Assistant Tool:
Enhance content creation for 40+ products

Everyday Assistants:
Comprehensive toolkit to streamline workflows from email generation to market research to industry trends

Event Compliance:
Augment pre-approval process for business amenities

Account 360:
Saves 180K hours weekly by aggregating client data for better engagement

Generative AI use case prioritization jam

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Gen AI use case prioritization framework

	Priority Area	Goal	Examples
1.	Go-to-Market Strategy & Planning	Increase use of client data and transform insights to action	• Competitive analysis • Account research • ABM play prioritization
2.	Sales & Marketing Alignment	Foster cross-functional collaboration	• AI-powered account dashboards • Predictive account scoring • Joint planning with AI insights
3.	Personalization & Engagement	Deliver consistent messaging and personalized customer experiences across channels	• Customer journey optimization • Account-tailored content • AI-versioned digital ads & social posts
4.	Measurement & Optimization	Demonstrate differentiated value and impact	• AI-based sentiment analysis • Predictive churn models • AI-curated feedback loops

THE GEN AI OPPORTUNITY

Generative AI "Jam Session":
Building confidence in strategic use cases

1

Your program challenge

For your assigned priority area, what is the #1 program challenge you will prioritize for your next Gen AI enabled solution?

2

Dependencies for Gen AI

What are the critical requirements & dependencies you see to activate the Gen AI use case?

3

Tell the room how you'd run it!

Share with the room the priority actions you'll need to take to make your next GenAI use case transformation happen!

Ready to innovate?

THE ACCOUNT-BASED MARKETING OPERATING MODEL

Reimagine marketing processes with gen AI

Content Engine
Customize content across the account journey, adjust the message and channels to guide accounts with greater relevance and more efficient marketing spend

Account data
Prioritize accounts in real time with market, account and data inputs:
- SalesTech & Martech
- Firmographics & technographics
- CxO behaviour (CBX)
- Client sentiment (Meeting transcripts)

Next Best Action
Focus on critical moments and optimize next best action drawing on what works using CBX/ABX data and data feed

Account nerve centre
Data & insights to take decisions on what's working, connect underlying patterns to plan, model scenarios and drive continuous improvement

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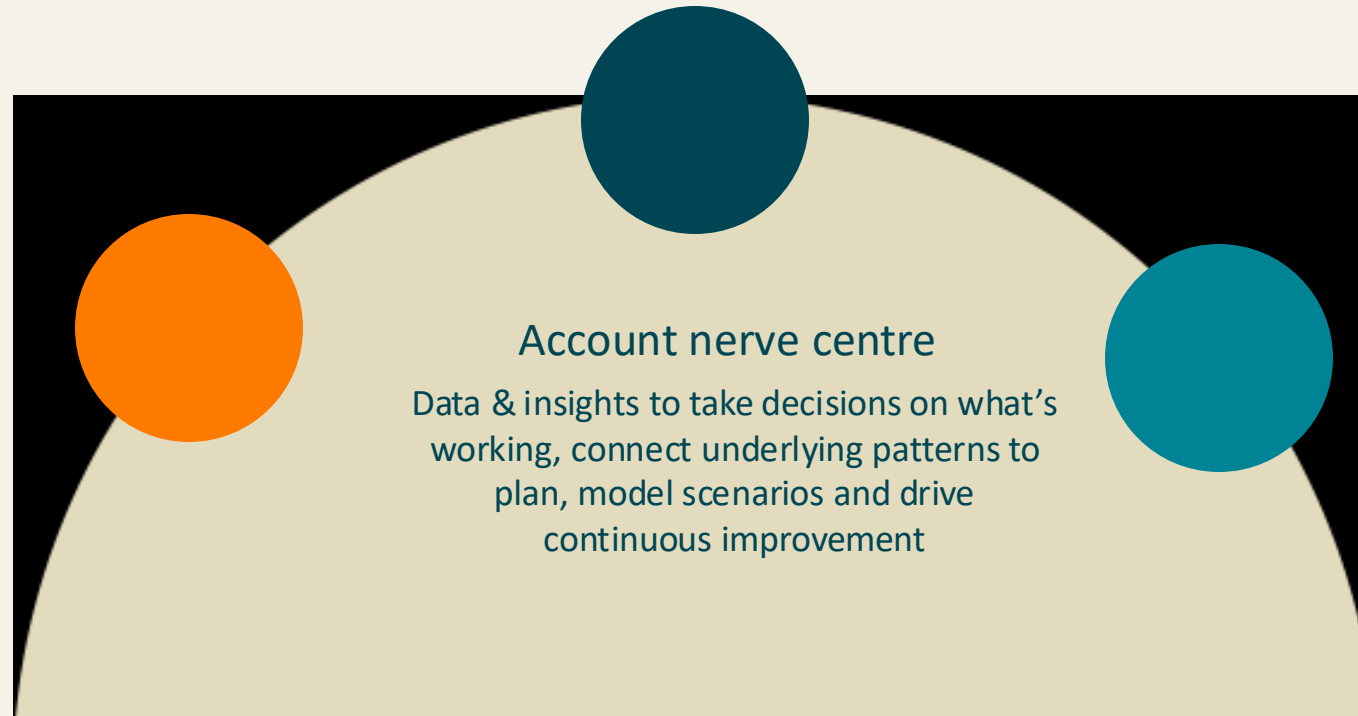
THE GEN AI OPPORTUNITY

What to do next

1

Do today

- Assess your insight gathering and activation processes

- Identify where cross-functional collaboration could be improved

- Evaluate how your organization produces content

2

Think about

- How can you help your clients reduce the friction in the buying experience?

- Where across the 7-steps could gen AI deliver productivity gains?

- What would be the business impact of nimbler GTM teams?

3

Make a plan

- Use a structured process to identify and prioritize gen AI use cases

- Determine who across the GTM organization will most benefit from gen AI training and enablement

- Create a vision for what your organization and workflow will look like 12 months from now

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Thank you!

Aaron Bean, aaron.bean@momentumitsma.com

Adam Bennington, adam.bennington@momentumitsma.com