



Survey

Account-based strategies in Europe:

What's the status quo, and who's leading the charge?



Explore

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We would like to thank the following individuals who generously gave their time during the creation of this report:

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- **Christoph Bauriedel**, head of banking Europe, Atos
- **Peter O'Neill**, lead analyst, B2B Marketing
- **Cordelia Burton**, managing director, Germany, The Marketing Practice
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- **Philippe Ruttens**, global demand generation, ABM & digital marketing, Cleverbridge
- **Frediana Bia**, senior manager, regional marketing EMEA, Ciena
- **Neil Berry**, global head of account and deal-based marketing centre of excellence, Atos
- **Paul Fleming**, senior sales director, EMEA, Autodesk
- **Renaye Edwards**, co-founder and managing director, Digital Radish

Introduction by the editor: David Rowlands, senior editor, B2B Marketing

Account-based marketing strategies are by no means new. Marketers have realised that this hyper-targeted, personalised approach yields much greater returns than a 'spray and pray' approach for some time now. However, we wanted to understand how things differ across Europe. What are the differences in account-based strategies between certain regions (if any)? Who's leading the way, and who's got some catching up to do?

Of course, we could have conducted surveys in every country in Europe, crunched the numbers, and provided every form of graph and table you care to mention. However, such an undertaking would take several months to conduct, and would defeat the purpose of what we're trying to achieve: to take a pulse check on account-based strategies in Europe – a snapshot of where we're currently at, and what the world of account-based strategy looks like.

With that in mind, I spoke to 10 senior marketers based in the UK, Germany and Benelux to understand the following:

- How mature are account-based strategies in different regions, and how has this changed in the last few years?
- What challenges do marketers and salespeople face in developing their account-based strategies and integrating their departments? Does this vary depending on the region?
- What do account-based strategies look like across different regions?

The interviews revealed subtle cultural differences in approach and challenges, as well as some larger, more tangible differences.

To learn more, read on...



David Rowlands,
Senior Editor

 B2B Marketing

Comparing regional account-based maturity

2.1. Germany and the UK

According to Christian Weiss, director ABM EMEA at Autodesk, Germany languishes behind English-speaking countries when it comes to account-based maturity, often due to their reluctance to be the first to try something new.

“Germans aren’t always keen on trying and testing from scratch and have a tendency to overthink,” he says. “While other cultures might try new approaches and technologies and fail, at least they’ve tried it. And this is a huge aspect of making account-based principles work. It requires deep change across culture, people and technology – and this isn’t always a good fit for people who are hesitant to embrace change, which isn’t traditionally part of a German’s DNA.”

At the other end of the spectrum, Andreas Bernhard, managing director for The Marketing Practice (TMP) in Germany, argues the maturity difference between Germany and the UK has become negligible – at least compared to five years ago.

“When I compare the UK and Germany’s account-based maturity, there was a big difference five years ago, but

now the gap has closed considerably, and it’s essentially the same level,” he says. “Of course, like many regions, it’s a mixed landscape here. Some of our clients have only just adopted an account-based approach, while others have been practising it for five years or more, which invariably has an effect on their maturity.”

Andreas’ colleague Cordelia Burton (a co-managing director in Germany) agrees, but points out that despite the fact most of their German customers have account-based principles embedded in their strategy in some shape or form, there are many different interpretations of what these strategies actually look like. “Regardless of who we talk to, everyone defines it differently,” she says. “So, one of our major challenges is bringing everyone onto the same page and defining those ground rules.”

Comparing regional account-based maturity (cont.)

2.2. Benelux and the UK/Germany

According to Philippe Ruttens, who is responsible for global demand generation, ABM and digital marketing at Cleverbridge, there are a number of factors that help determine a region's account-based maturity, from budget to target audience (SMEs versus enterprise), and the product to the customer journey being created – and this directly feeds into how he ranks each region's maturity. "The US is definitely the most mature when it comes to account-based approaches, followed by the UK, and then smaller regions like Germany, Benelux, and Scandinavia."

But for Philippe, an often-overlooked aspect that contributes towards the maturity of a region is the people that make up that market. "Because regions like the US and UK have been practicing account-based methods for more

years than Germany and Benelux, they naturally have more experts and top talent," he says. "Talking about Belgium in particular, I'm not really aware of any specific ABM agencies or dedicated consultants, apart from myself."

In Philippe's experience, Benelux does represent a strong area for growth and performance marketing when it comes to B2B, but for account-based strategies? Not so much. "In Germany, there seems to be a lot more agencies with account-based expertise when compared to the Netherlands, and a big part of this is the technology," he says. "In my opinion, the ABM maturity of a country goes along with the level of tech maturity available in that region, and most of these tools are built in the US and UK."

The Lewis Model, which divides humans into categories not on religion or nationality, but rather on behaviour, is a framework that Renaye Edwards, co-founder and managing director of Digital Radish uses regularly when analysing accounts from different regions.

1. Linear-active: These regions are planners and more task-oriented. They prefer direct discussions based on facts and

figures, and believe a good product sells itself, meaning they can be averse to direct sales approaches. Typically consists of the 'English-speaking world' (USA, UK, Australia and New Zealand), but also includes Scandinavia and Germanic regions (Germany, Austria, Switzerland and Benelux).

2. Multi-active: These regions are more talkative, impulsive and put more focus on the relationship over the product. A more

dispersed membership, from Southern Europe (Italy, Spain, Portugal) to Central (Mexico) and South America. Also includes some Arabic regions and the Middle East (Saudi Arabia, India, Pakistan).

3. Reactive: These regions rarely initiate action, and prefer to listen first. They lean towards lengthy sales discussions and favour face-to-face interaction over digital comms. *Located across the majority of the Asian continent (China, Japan, South Korea).*

“We use the Lewis Model to decide which general behavioural traits we should be taking into consideration. Once we’ve calculated which Lewis category they fall into, we overlay persona and personality profiling, particularly if we’re following a one-to-one or one-to-few strategy.”

Renaye Edwards, co-founder and managing director of Digital Radish

2.3. How has Covid accelerated account-based change?

As the Covid-19 pandemic shook the world, the rules of business and marketing were essentially re-written overnight, but, as Cordelia observes, there’s been a huge account-based boom in Germany as a result of the pandemic. “A big change we’ve witnessed is that many companies are re-building their marketing mix to include account-based strategies on a more efficient scale,” she says.

Yet, despite how far many companies have come during the pandemic, Frediana Bia, senior manager, regional marketing EMEA at Ciena (based in the UK), says there’s always room for improvement. “Organisations embracing ABM have matured a lot during the past two years, and campaigns can always be more targeted and better integrated with the sales teams, Organisations embracing ABM have matured a lot during the past two years, and campaigns can always

be more targeted and better integrated with the sales teams,” she says.

For her, these struggles mainly come down to technology integration and security between different platforms. “The more difficult it is to integrate your technologies, the less compelling your programmes will be, and your account-based approach will be less impactful.”

Indeed, by ensuring campaigns are more targeted, marketers can avoid fragmented GTM approaches. Being more targeted doesn’t just mean more effective messaging, it also means you can stop spending precious time sending irrelevant messages to the wrong

people at the wrong time. By doing this, marketers could even be alienating potential customers through the amount of – let's face it – spam being sent out.

For Paul Fleming, senior sales director EMEA at Autodesk, the pandemic has not only prompted change to the way his teams use technology, but shifted how his teams directly engage with customers, across the UK and Europe. “From a customer perspective, their needs have completely changed, the nature of the work they deliver has changed and, therefore, our approach must change in tandem.”

According to Paul, these shifts chiefly revolve around ways of working, including the evolution towards a hybrid working model and also customer-facing activity being limited to digital. “As restrictions lift, it's important to consider that many customers won't want to return to the 'face-to-face' nature of conducting business – and, as salespeople, we have to respect that,” he says.

Adopting a vertical model in the middle of a global pandemic – Atos snapshot

During the pandemic, global digital leader Atos adopted a vertical approach, which, for its global head of account and deal-based marketing centre of excellence, Neil Berry, really displayed how independently different markets could operate.

For Neil and his team, establishing commonalities between these markets formed a huge part of Atos' marketing transformation over the pandemic. His German-based colleague Christoph Bauriedel, head of banking Europe, has witnessed firsthand the benefits of this shift in cultural mindset. “The ever-digital nature of today's business world has helped level the playing field to a certain extent, with different account managers from different regions now more integrated across the continent,” he explains. “Being able to join calls with account managers from across Europe really helps those who are less

exposed to the UK and US cultural approach learn what's possible by adopting a more direct and open style, where success is openly shared and celebrated.”

When scaling their ABM, Neil admits one of the biggest challenges was getting everyone onboard with shifting their mindset and establishing trust with those regions more reticent to change. “When we started scaling, some people were convinced immediately, but others found it encroached on their accounts and ways of working,” he says. “To overcome this, we put a lot of time and effort into building relationships with these sales and accounts teams, helping them realise we were there to grow their part of the business, not intrude on their customers.”

3. Putting the foundations for account-based strategy in place: The integration of sales and marketing

While the sales/marketing conundrum is evident across most aspects of B2B marketing, it's perhaps most pertinent when discussing account-based strategies. For Philippe at Cleverbridge, the issue of sales and marketing alignment is not specific to (or, indeed, worse in) any one specific region or country. It's a perennial challenge that transcends language and borders. "I've been in B2B marketing for 25 years, and it remains an issue across almost every region," he says. "After all, the most difficult aspect of an account-based approach has always been the alignment between the people, and sales and marketing sit at the centre of this."

For businesses practicing account-based methods, the ideal scenario would be to involve client success, product, and account teams in order to deliver a seamless, end-to-end ABM approach. But, as Philippe points out, that's difficult to achieve when the two key remits of sales and marketing are still struggling to properly understand each other.

For him, the sales/marketing conundrum is less about a specific country/region, and more about the culture and ecosystem of each individual company. "It's always down to the mindset, processes, and tools an organisation uses," says Philippe. "Are your teams using the same platforms and technologies? Do you have strong leaders to bring those teams together? These are the questions companies should be asking themselves when it comes to sales and marketing alignment."

3.1. You're my best friend: Bringing sales and marketing together

"Marketing and sales need to be best buddies," says Paul. "For both teams, your time is restricted and precious. Sales don't work on volume anymore. It's all about quality, and marketing has a huge role in ensuring that quality."

This brings us back to the earlier point we made about fragmented GTM. If sales and marketing don't take heed of this message and continue to work in siloes, the consequence will be a less targeted approach, which, in turn, is only going to lead to one thing: less business.

As Paul quite rightly points out, when managing a complex portfolio of customers, one of the key skills companies should master is the ability to keep all those various plates spinning. And that's where account-based strategies come into their own. If done right, it represents the perfect blend of marketing, communication and education, all aimed at increasing interest from the customer's side, which will ultimately lead to a sale.

A few hundred miles away in Germany, for Paul's colleague Christian, his ABM team serves as an extension of the sales team, meaning when it comes to planning, prioritising and strategising, it's a joint endeavour. They decide their target audience together, select their account-based approach together – whether that's one-to-few or one-to-one – and tackle issues together. "One topic we're working on right now is optimising the entire lead and pipeline flow to avoid drop-offs," Christian explains. "Both sales and marketing are analysing this together, and talking about joint solutions to keep the pipeline healthy."



3.2. Sales and marketing alignment between regions

When it comes to cultural differences between countries, there are even regional nuances when it comes to sales and marketing alignment, as Christian explains. “In Germany, marketing and sales carry mixed opinions of each other,” he says. “Companies with a traditional marketing/sales setup often work in silos – meaning marketers throw leads over the fence to sales, and that’s it. Sales then, quite rightly, complain about the lead quality.”

For Christian, the more each team understands the value of each other, and appreciate each other’s work, the better the collaboration. “It is critical that companies realise sales and marketing are a combination, not a competition,” he says. “That’s the modern view, approaching problems from a combined perspective, asking questions like: how can we fix this together?”

3.3. Data siloes, begone!

Here, it’s important to note that ‘sales and marketing alignment’ doesn’t just mean sales and marketing being on the same page on a human-to-human level (although that’s still a crucial factor). It also means both departments working with the same data – both seeing the exact same information and being able to plan and act accordingly.

When there are data siloes, this can limit the effectiveness of both marketing and sales. After all, rather than pooling resources and intelligence together, both parties are effectively working with one hand tied behind their back. This can often lead to a fragmented GTM approach, as both sales and marketing might be seeing a slightly different picture in front of them (depending on the data they have available), and therefore acting differently.

In Frediana’s words: “In Frediana’s words: “I would say, in general, sales teams are willing to collaborate with marketing, and, in order to be fully integrated, there is a need to leverage available tools to share information (i.e. intent, etc). If the integration is not there, and the reporting is manual, it’s not possible to exploit it properly and in a timely fashion.”

Christian agrees with the sentiment, claiming: “Sometimes, it’s siloed and marketers throw leads over the fence and that’s it! And then, BDRs complain about the lead quality that comes back to them. What we’re doing more and more of is looking at how we can approach things jointly. For instance, one thing we’re looking at currently is the entire lead and pipeline flow, from the first click, down to ACV or revenue to avoid significant drops in the middle, so that we are analysing jointly how to optimise this and keep the pipeline healthy.”

“I think the basis is an insight report with 100% transparency,” Christian continues. “And for that reason, we have custom-made dashboards where we can see the same data as sales.”

To continue operating in data siloes can only be negative. In fact, as Christian points out: “I think it helps to have trust on both sides. We share everything we have on the table, and then create a plan accordingly, instead of blaming the other side, claiming that they don’t know anything or not enough!”

Philippe agrees, arguing that the importance of reliable and consistent data reporting cannot be underplayed. As he points out: “You can have the best ABM campaigns and approach in the world, but if you don’t have the data, you’re not going to go far.”

In the interviews we conducted, it was clear that getting a single source of the truth when it comes to data is a key way to ensure your organisation is optimally aligned to targeting your customers and prospects. You can of course still do this by operating in data siloes, but you could be leaving money on the table through unoptimised processes. As if that wasn’t enough, you could be creating more work for yourself (and sales) by relying on manual processes.



4. What does an account-based strategy look like across these regions?

For Neil at Atos, he believes there's a real untapped opportunity to create a shared best practice approach by combining learnings from different regions. "We're taking our best practice and applying it across all countries, and it means I'm learning a huge amount from our other regions," he says. "For example, I worked on a deal in Morocco, and it blew my mind the volume of cultural differences we needed to take into consideration. We were already conscious of cultural differences in our regions, but having that local knowledge and awareness is critical."

From a sales perspective, Christoph at Atos says assigning strict joint goals for marketing and sales isn't always healthy. "Marketing is an absolutely natural and necessary component of any account, but good marketing support can't always be measured in pounds and euros," he says. "Yes, you know how much it costs, and you probably know, that without marketing's support it wouldn't have been possible. But being overly focused on hard numbers in shared goals can result in pointless discussions about figures."

At Digital Radish, Renaye and her team meticulously analyse each target against a number of criteria, including a region's economics, regulatory restrictions, technology, and other competitive factors that are driving change such as channel preferences. "We know that German brands are more likely to use XING over LinkedIn, or that US brands want more product-centric messaging compared to the UK, who prefers a narrative built around problem solving – so our approach changes based on this knowledge."

4.1. Join metrics between sales and marketing: yay or nay?

One area that often divides opinion is the question around whether sales and marketing should share joint KPIs and metrics in their quest for a successful account-based approach.

Cordelia at The Marketing Practice (Germany) firmly believes sales and marketing should possess joint objectives and targets, but they must also be connected to the overall business strategy. “The best-case scenario for an account-based approach is true integration, where sales and marketing have one single agenda, and the customer sits at the centre of it,” she says. “This relies on both teams working together to drive pipeline and new wins – but in Germany, this approach is still a utopia.”

Christian also shares this view, although he does admit that marketing’s contribution can sometimes be tricky to prove. “Of course, there are sometimes misunderstandings when it comes to marketing’s influence,” he says. “It’s not that we’re claiming business, but we’re contributing to the pipeline through subtle influence, prompting engagement.” As he explains, this influence needs to be repeated – its definition made crystal clear to the rest of the business – in order to prove the long-term value marketing is providing to the sales pipeline.

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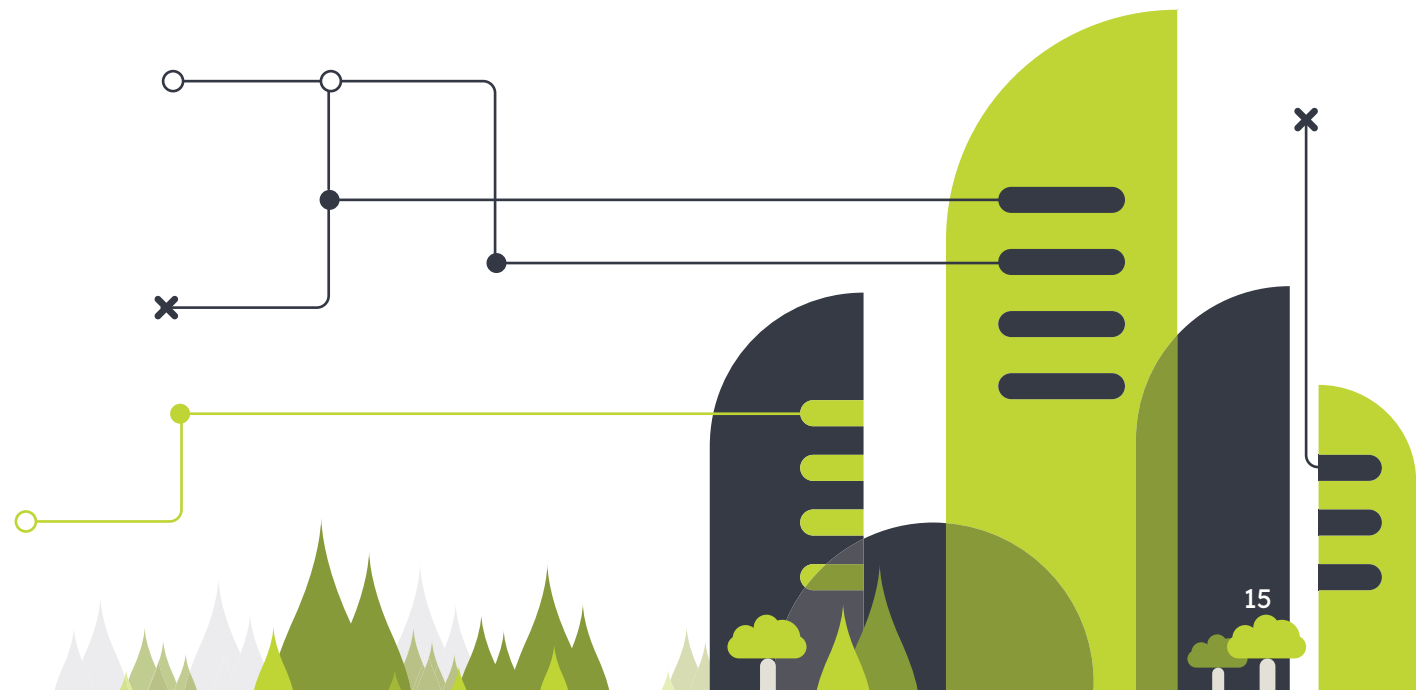
4.2. How account-based strategies will evolve

When it comes to scaling and evolving your account-based approach, Paul says it’s all about using data and the insights it reveals to identify areas of growth, both from an existing account perspective, but also an industry-wide one. “Our strategies are data-driven, selective, and scalable from one-to-many to one-to-few,” he says. “What we’re actively trying to avoid is mass marketing, instead being more selective and driving content around business outcomes, not just product.”

According to Paul, much of the initial set up and insight for an account-based programme will inevitably come from your feedback loop, and it’s ultimately down to the sales team to constantly evidence what’s working and what isn’t. But he also stresses the importance of a joint discussion between sales and marketing, an ongoing discussion that’s

constantly informing and improving the eventual outcome. “It’s not a relay, where you hand the baton off to each team,” he says. “It’s a continual loop, something that you check and balance on a consistent basis, and that relies on strong communication between teams to execute successfully.”

But how do you ensure an account-based approach works? According to Paul, the solid foundational layers are planning, data, and technology – but the most important aspect overlaying all of those is teamwork. “As sales leaders, we need to really encourage that level of collaboration, and that comes from the top down,” he says. “We need to align with our colleagues in marketing, share regular updates, and be in constant communication. That’s how we’ll continue to progress.”



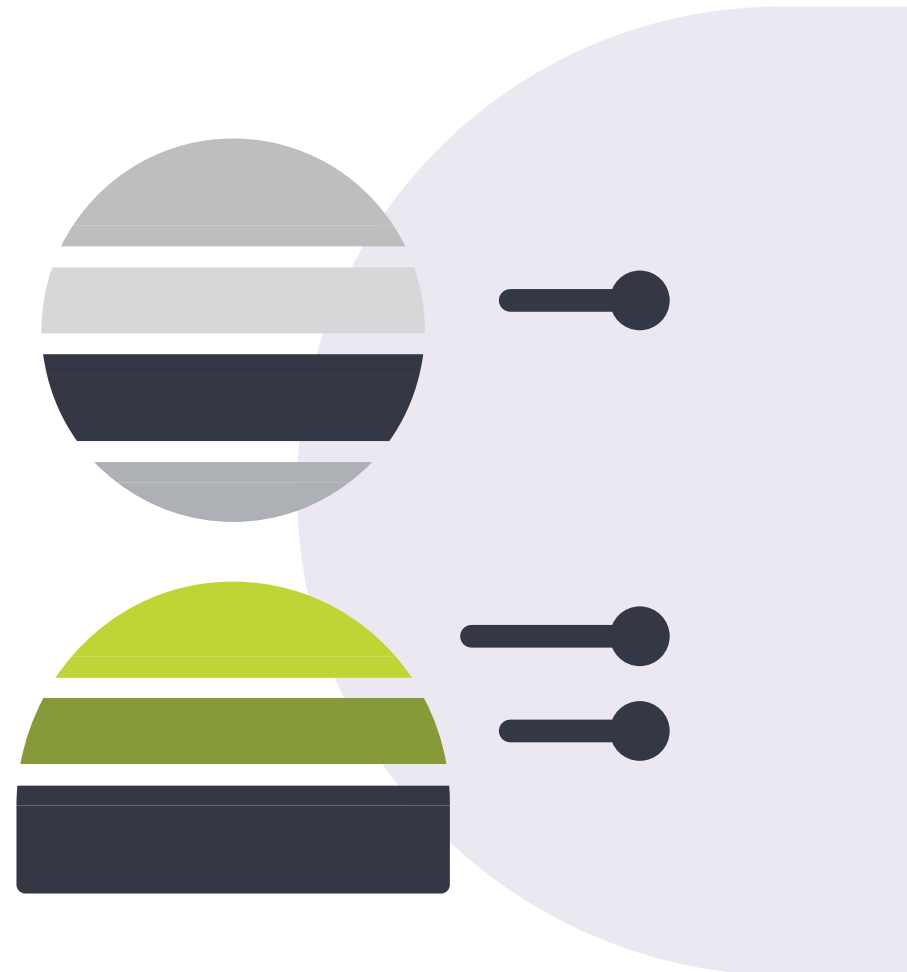
5. The rise of account-based experience (ABX)

As many marketers have queried over the years, doesn't ABM just represent good marketing? Certainly, the evolution of ABM to incorporate more players has given voice to arguments that the whole strategic approach should be re-named.

Paul fully endorses the notion that other aspects of the business should be brought into the account-based journey. "If we're successful, it's not just down to an account-based campaign; it's whether a product or solution is fit for market, or whether a customer is happy with their post-purchase aftercare." he says. "Ultimately, that's down to the product team and customer success team being part of the account team discussion," he says.

This idea of engaging – end to end – with customers with relevant content, delivered in a trusting environment is what's given birth to the concept of account-based experience (ABX) – redefining and rethinking ABM as a customer-centric strategic approach that brings together the engagement of inbound marketing with the personalisation and precision of ABM.

"For me, this is the next logical step in the evolution of ABM," says Neil. "In terms of what ABM delivers at a one-to-one level, it's already an account-based experience – and that's where we ultimately want to scale our accounts towards."



6. “Smarter GTM beats the alternative every time,” Paul Gibson VP International, Demandbase.

The insights from the interviews were fascinating and are certainly aligned with the trends that we have been noticing across the European sales and marketing landscape.

While the approaches are different for different organisations, we know account-based methods work. We need to treat people differently based on what industry they're in, the size of their business, their region and where they are in their buyer journey and it's great to hear some methodologies of how this is being done.

However, the reality is that modern buyers are overwhelmed with information. It remains truer today than ever before. B2B companies have deluged buyers with even more blogs, ebooks, webinars, product reviews, videos, emails, phone calls, and so on. Companies fight with each other to get the buyer's attention, and so the battle escalates. Everyone tries to get the customer's attention, the customer gets a terrible experience, and nobody wins.

They don't want to be marketed to. They don't want to feel sold to. And they will let you know by opting-out, tuning-out, and tossing-out any unwanted interruptions. They'll do

everything they can to stay anonymous and avoid forms since they know it'll just lead to unwanted omni-spam.

It's no longer news that buyers want to do their research anonymously before talking to sales. But the key change is that 10 years ago, the vast majority of the research happened on our own websites so we could observe the behaviour. Today, however, buyers that want to avoid being emailed or called are doing more of their research on third-party websites – which is hidden to traditional marketing automation scoring.

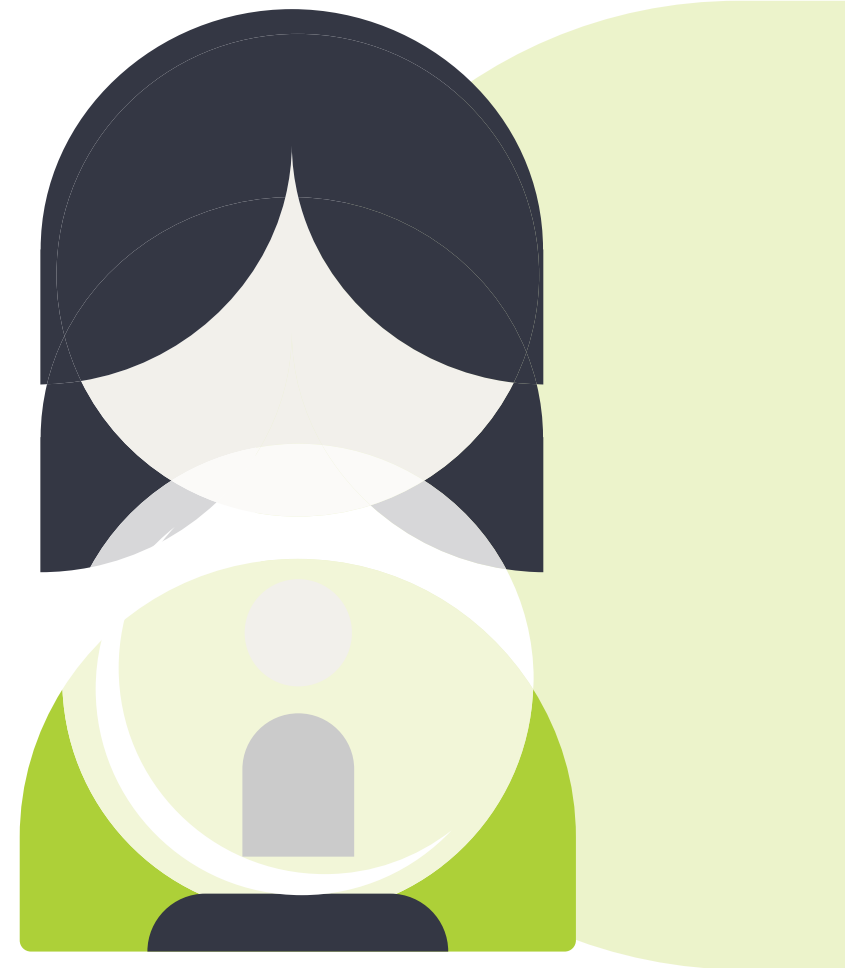
All this puts B2B companies in a remarkable quandary. On one hand, we want to respect our buyers and not interrupt them with unwanted outreach. On the other, prospects are conducting much of their buying journey on their own, online, anonymously.

If we wait for the prospect to fill out a 'contact me' form, we've waited too long. The prospect has learned a lot, formed opinions, and may have a preferred vendor (likely not you) in mind. Or worse, a competitor closes the deal before you even have a chance to engage.

Account-based experience resolves this dilemma by aligning your go-to-market efforts to the account journey. With ABX, you know where the account is in its decision process and create the right experience each step of the way.

A common challenge that we're hearing from those interviewed and for many European organisations is that fragmentation caused by data silos, disconnected systems, channels, processes and teams has an impact on how companies are able to go-to-market effectively. Many organisations have an inability to see target accounts clearly and engage them intelligently.

This is where technology plays a crucial role by streamlining the data and injecting account intelligence into every step of the buyer's journey. The outcome is that organisations can see opportunities earlier, progress deals faster, and drive growth further.



About B2B Marketing and Demandbase



B2B Marketing

Powered by the community, for the community. Established in 2004, B2B Marketing is now the number one go-to resource for B2B marketers across the globe. Right from the start, B2B Marketing had a clear mission that remains as strong and clear today: to provide marketers at business brands with the tools, insight and inspiration they need to grow and succeed – as both individuals and businesses. To do this, B2B Marketing needs to continually evolve to make sure it's delivering what you need. This is why Propolis was born – the community for B2B marketers. B2B Marketing is proud to serve as the focal point for the B2B marketing sector, and to be a force for greater connectivity, enabling marketers and leaders to share experiences and learn from one another.

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