

**FUNDAMENTALS**

**OF NEXT-GEN**

**MARKETING**

**WORKBOOK**

**& STUDY GUIDE**

**NO** FORMS.  
SPAM.  
COLD CALLS.

**SECOND EDITION**

# CHAPTER 1

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## A NEW ERA OF SALES AND MARKETING

### CHAPTER SUMMARY

Confronted with the realization that traditional B2B sales and marketing tactics and technologies deliver MQLs, but horrendous experiences for our prospects (who are future customers!), Latané shares the major “a-ha! moments” that led her to ditch convention and boldly embrace a powerful future that puts prospects and their experience at the core of everything we do. Taking this leap wasn’t without risk, and overcoming the doubters and naysayers meant testing, and ultimately proving, that a new approach based on Big Data, AI, and machine learning could deliver superior results. Latané’s story of perseverance will inspire others to choose the more difficult but more rewarding path — the path toward breakthroughs.

### KEY TAKEAWAYS

- We’re facing a crossroads in B2B sales and marketing, with a future powered by customer-driven experiences that are fueled by meaningful account insights, Big Data, and AI.
- We’re living in the Age of the Customer, in which success is determined by how well you empower and engage your customers.
- We continue to treat our prospects (future customers) like dirt, blocking their access to information with forms, annoying them with spam, and disrupting their lives with cold calls.
- Today’s buyers are different, remaining anonymous longer, forming buying teams, resisting our outreach efforts, and hiding out in the Dark Funnel™.
- The path ahead requires real account insights to understand where an account is in their buying journey, and a shift to customer-led digital experiences free of forms, spam, and cold calls.

# KNOWLEDGE-BUILDING PRACTICE & EXERCISES

1. We're at a crossroads in B2B sales and marketing as traditional strategies, tactics, and technologies are producing \_\_\_\_\_ results.

2. A new and powerful future is on the horizon, driven by **(select all that apply)**:

- Meaningful account insights
- CMOs with no experience in marketing
- Mobile technology
- Big Data and AI
- Companies that take on social causes
- Customer-driven experiences

3. True/False **(circle the correct answer)**

Tech advances designed to meet this new future are exciting, but if we don't know what we're doing with them, they can turn into an anchor keeping us stuck in one place.

## THE AGE OF THE CUSTOMER

4. Since 2011, we've been living in the Age of the Customer, in which success is determined by how well you empower and engage your customers. What were the previous ages that fueled business in the 20th century?

- Age of Enlightenment
- Age of Adoption
- Age of Manufacturing
- Age of Democratization
- Age of Inclusion
- Age of Distribution
- Age of Information
- Age of Construction

5. Today, customer experience is the backbone of success. \_\_\_\_\_% of customers report that they value the experience a company provides just as much as the products or services?

- 25
- 60
- 40
- 80



12. MQLs aren't worth a dime because (select all that apply):
- The definition differs from organization to organization
  - Most are just "tire kickers" not really worth pursuing
  - They're often engaged too early, when they're not ready
  - Arbitrary lead-scoring gives weight to sometimes-meaningless activities
  - Sales doesn't understand what to do with them
  - They're thrown "over the wall" to sales with no insights
  - Marketing doesn't really understand what qualifies as a good lead

## A SHIFT TOWARD A CUSTOMER-LED DIGITAL EXPERIENCE

13. If we want to truly engage our potential customers, we need to break free of MQLs, forms, spam, and cold calls. We need to base our sales and marketing efforts on real data and real insights. We need to understand \_\_\_\_\_ & \_\_\_\_\_.

14. Match the definition with the stages of the buyer journey.

<b>TARGET</b> Under a Rock	<b>AWARENESS</b> Signs of Life	<b>CONSIDERATION</b> Learning	<b>DECISION</b> Engaging	<b>PURCHASE</b> Meeting
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	Comparing their different options and deciding which one to go with.
	Ready to turn into real opportunities, comparing solutions, scheduling meetings, and deciding which solution is the best fit.
	Not researching specific brands yet, but searching generic keywords/topics related to your solution.
	Not actively researching products and solutions like yours; showing no signs of intent.
	Eager to learn; beginning to engage with the brand and content.

15. When you really know where customers are in the buying journey, you can find the sweet spot when they're most likely to:
- Sign a contract
  - Provide a referral
  - Be influenced by your messages
  - Advocate for your solution with the buying team
16. This sweet spot is when they're \_\_\_\_\_, not inbound, which is a key concept to making meaningful changes in your sales and marketing.



**TIP:** To see a real-world example of content mapped to buying stage and keywords, check out our content hub example on [page 19](#).

## ACT ON REAL INSIGHTS

17. Your new North Star must be real insights about your accounts that go beyond just demographic and firmographic data to understand **(select all that apply)**:
- Buyer sentiment and emotion
  - Their purchase process
  - Who the key decision-makers are
  - What they are researching
  - Their tech stack
  - Where they are in their buying journey
  - Who is on the buying committee
  - The politics of the buying team
18. This is the kind of deep knowledge that will allow you to deliver \_\_\_\_\_ over the \_\_\_\_\_, to the \_\_\_\_\_, and at the \_\_\_\_\_.

## A BOLD PATH FORWARD – THE “NO FORMS, NO SPAM, NO COLD CALLS” MANIFESTO

19. A “no forms” approach means making it as easy as possible for future customers to get information and eventually buy by removing barriers to learning. When is it OK to use forms? **(Select all that apply)**
- On top-converting content
  - For a demo request, or to contact you
  - With an online assessment tool
  - With thought leadership/original research
  - For sales collateral/1-pagers
  - For webinar/event registration

20. “No spam” does not mean you can never send emails. It means if you know nothing, you do nothing.

If you follow that rule – only sending emails to people you know about and who are in-market, it's nearly impossible to spam. Avoid sending an email to a prospect unless you know **(select all that apply)**:

- All the members of the buying committee
- Key personas in the account
- What they care about, based on keyword research
- The real problem they are trying to solve
- That budget has been allocated for your project
- What stage they're at in the buying journey

21. “No cold calls” means that calling remains valuable – not only for pipeline building, but also for building confidence and knowledge as a seller. However, it is essential that reps have all the rich information they need to be able to lead with value and have a meaningful conversation. Do not call a prospect unless you know **(select all that apply)**:

- The prospect is “in-market”
- Why the current solution is not working
- How to have a meaningful conversation and add value
- The prospect's top business concerns
- How to articulate the context of why the call is being made
- What competitors are in the deal
- Who the ultimate decision-maker is
- What the prospect really cares about

22. A “no-cold-call” philosophy requires a shift from static sales territories to dynamic territories based on customer intent. This ensures that we are not:

- Duplicating our efforts
- Reaching out to contacts at the wrong time
- Chasing accounts that look like a good fit on paper, but are not in-market
- Putting up unnecessary barriers

23. The ability to change territories based on in-market accounts ensures AEs have the best possible chance of hitting their numbers. **Why?**

- Because it is now possible to work virtually, eliminating the need to “be in the room”
- Because AEs are able to prospect more easily when accounts are “in-market”
- Because AEs are always working accounts with the highest likelihood of opening an opportunity
- Because they are not limited to only working accounts in their patch



# CHAPTER 1

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## TERMINOLOGY

Draw a line to match the term with its definition.

Anonymous, Fragmented,  
Resistant ●

Buying Stage: Awareness ●

Buying Stage:  
Consideration ●

Buying Stage: Decision ●

Buying Stage: Purchase ●

Buying Stage: Target ●

Dynamic Territories ●

In-market vs Inbound ●

Marketing-Qualified Lead  
(MQL) ●

No Cold Calls ●

No Forms ●

No Spam ●

The Age of the Customer ●

The Dark Funnel™ ●

The Virtuous Cycle ●

- A complex chain of events that reinforce themselves through a feedback loop. For example, a great employee experience leads to a great customer experience.
- A time when customers have unlimited access to information and have radically different expectations for their customer experience.
- The state of modern B2B buyers. They aren't reaching out to us; they're buying in teams, not as individuals; they're skeptical of our message.
- Buying activities and signals that go unseen by sales and marketing teams.
- A contact who has engaged with marketing's efforts in one way or another, is arbitrarily scored, and is handed off to sales.
- Accounts that are essentially living under a rock, are not actively researching products and solutions like yours, and are showing no signs of intent.
- Accounts that are just starting to show some signs of life, are not researching specific brands yet, but are searching generic keywords.
- Accounts that are eager to learn.
- Accounts that are at the prime time to actively engage. They are comparing different options and deciding which one to go with.
- Accounts that are ready to turn into real opportunities, getting into the nitty-gritty of comparing solutions, scheduling meetings, and deciding which solution is the best fit for them.
- Accounts that can be identified in an active buying stage, vs accounts that have contacted you for information.
- The philosophy of eliminating all barriers for prospects to consume education and product-related content unless it is absolutely necessary to collect a person's information (e.g., to register for an event, use an online tool, or ask to be contacted).
- The idea that an email is not sent to a prospect unless we know what they care about based on keyword research, key personas in the account, and what stage they're at in the buying journey.
- An approach to outreach that says we do not call a prospect unless we know all of the following: The prospect is "in-market" for our solution, what the prospect really cares about, how to articulate the context of why the call is being made, and how to have a meaningful conversation and add value.
- A process of evaluating, prioritizing, and assigning AE sales territories based on a daily, and then quarterly, review to add/remove accounts based on intent and activity, rather than physical location.

# CHAPTER 1

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## ANSWER KEY

1. Diminishing
2. Meaningful account insights; Big Data and AI; Customer-driven experiences,
3. True
4. Age of Manufacturing; Age of Information; Age of Distribution
5. 80
6. Steve Jobs; Richard Branson
7. Both our employees and our customers
8. Gating content with forms; Spam emails; Unwanted cold calls
9. Anonymous; Buying teams; Resistant
10. Hidden from sales and marketing teams
11. By sending more irrelevant emails and making more unsolicited calls, pushing prospects further into the Dark Funnel™
12. The definition differs from organization to organization; They're often engaged too early when they're not ready; Arbitrary lead-scoring gives weight to sometimes-meaningless activities; They're thrown "over the wall" to sales with no insights
13. How modern buyers buy; The stages of engagement – and know when to act
14. Decision; Purchase; Awareness; Target; Consideration
15. Be influenced by your messages
16. In-market
17. Their tech stack; Who is on the buying committee; What they are researching; Where they are in their buying journey
18. Personalized content; Right channel; Right person on the buying team; Right time
19. With an online assessment tool; Webinar/ event registration; For a demo request, or to contact you
20. What they care about, based on keyword research; Key personas in the account; What stage they're at in the buying journey
21. The prospect is "in-market"; How to have a meaningful conversation and add value; How to articulate the context of why the call is being made; What the prospect really cares about
22. Chasing accounts that look like a good fit on paper but are not in market
23. Because they're always working accounts with the highest likelihood of opening an opportunity

# ANSWER KEY (CONTINUED)

## **The Virtuous Cycle**

A complex chain of events that reinforce themselves through a feedback loop. For example, a great employee experience leads to a great customer experience.

## **The Age of the Customer**

A time when customers have unlimited access to information and have radically different expectations for their customer experience.

## **Anonymous, Fragmented, Resistant**

The state of modern B2B buyers. They aren't reaching out to us; they're buying in teams, not as individuals; they're skeptical of our message.

## **The Dark Funnel**

Buying activities and signals that go unseen by sales and marketing teams.

## **Marketing-Qualified Lead (MQL)**

A contact who has engaged with marketing's efforts in one way or another, is arbitrarily scored, and is handed off to sales.

## **Buying Stage: Target**

Accounts that are essentially living under a rock, are not actively researching products and solutions like yours, and are showing no signs of intent.

## **Buying Stage: Awareness**

Accounts that are just starting to show some signs of life, are not researching specific brands yet, but are searching generic keywords.

## **Buying Stage: Consideration**

Accounts that are eager to learn.

## **Buying Stage: Decision**

Accounts that are at the prime time to actively engage. They are comparing different options and deciding which one to go with.

## **Buying Stage: Purchase**

Accounts that are ready to turn into real opportunities, getting into the nitty-gritty of comparing solutions, scheduling meetings, and deciding which solution is the best fit for them.

## **In-market vs Inbound**

Accounts that can be identified in an active buying stage, vs accounts that have contacted you for information.

## **No Forms**

The philosophy of eliminating all barriers for prospects to consume education and product-related content unless it is absolutely necessary to collect a person's information (e.g., to register for an event, use an online tool, or ask to be contacted).

# ANSWER KEY (CONTINUED)

## **No Spam**

The idea that an email is not sent to a prospect unless we know what they care about based on keyword research, key personas in the account, and what stage they're at in the buying journey.

## **No Cold Calls**

An approach to outreach that says we do not call a prospect unless we know all of the following: The prospect is "in-market" for our solution, what the prospect really cares about, how to articulate the context of why the call is being made, and how to have a meaningful conversation and add value.

## **Dynamic Territories**

A process of evaluating, prioritizing, and assigning AE sales territories based on a daily, and then quarterly, review to add/remove accounts based on intent and activity, rather than physical location.

# DOWNLOADABLE TEMPLATES & RESOURCES

## CHAPTER 1

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### VIDEOS

- MakingSense of ABX



### EBOOKS / ARTICLES

- eBook: ABM is Just Good Marketing

## NOTES

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# CHAPTER 2

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## IT'S TIME FOR CMOs TO PLAY OFFENSE

### CHAPTER SUMMARY

It's time for CMOs to step up and become chief market officers — the experts who deeply understand and advocate for their markets. To truly change the way we market and sell, a new breed of CMOs needs to lead the charge. This means ditching the busywork and instead driving experiences, the brand, and growth. Latané shares her experience on how CMOs can differentiate themselves by owning the company's strategic plan, deepening their knowledge of the market using customer insights, embracing the principles of category design, and becoming unifiers who enable and embody the company's culture.

### KEY TAKEAWAYS

- The value of the CMO is under threat, making it the shortest-tenured role in the C-suite. The lack of perceived value is turning career success into an uphill climb for marketing leaders.
- For marketing leaders, it's time to play offense. It's time to put a stake in the ground and say, 'This is what marketing is.' It's knowing and owning the market.
- CMOs can differentiate themselves and become unifiers by showing up in four key areas: Strategy, Customer Insights, Category Design, and Culture.
- It's time for a bold new approach. It's time to start treating our customers the way we want to be treated. And to do that, we need to understand our market, our companies, and ourselves in ways we never have before. This new approach requires a new type of leader — an empowered, unifier-type CMO.

# KNOWLEDGE-BUILDING PRACTICE & EXERCISES

1. A global survey by Accenture revealed that two out of three CEOs don't believe:
  - Marketing is a strategic function that needs to be included in setting company direction
  - CMOs have the background in finance and operations necessary to help set the direction of the company
  - Their marketing leads possess the business acumen or leadership skill their role requires
  - CMOs have a broad enough perspective of the business to set strategy

## THE INCREDIBLE SHRINKING CMO

2. Companies like Johnson & Johnson, Hyatt, and Uber are \_\_\_\_\_.
3. Of all the C-suite titles, CMOs have the shortest tenure. In 2020 that was:
  - 0.5 years
  - 1.5 years
  - 3.5 years
  - 4.5 years
4. The demands of sales are completely, and necessarily, different from those of marketing. Sales needs to keep its eye on \_\_\_\_\_ or – with longer cycles – \_\_\_\_\_ goals.
5. Marketing requires a broad and deep understanding of the market, as well as \_\_\_\_\_ strategic insight and planning.
6. Kate Bullis, managing partner at executive search firm SEBA International, says the CMO is responsible for these three things:
  - Pipeline, leads, and brand
  - Brand, experience, and growth
  - Thought leadership, brand ID, positioning
  - Messaging, sales enablement, pipeline

# NEW RULE: NO MORE VERBING

7. CMOs often find themselves immersed in activities and tasks – creating content, churning out MQLs, publishing press releases, and launching products, for example. These activities and tasks:
  - Should be given to subordinates to ensure they can deliver results
  - Are the reason it's so hard for CMOs to prioritize their efforts
  - Must be directly tied to pipeline for CMOs to ensure value
  - Keep the CMO connected to the day-to-day needs of the team
8. CMOs often find themselves crushed by the weight of all this \_\_\_\_\_, due to a lack of understanding about marketing at the highest levels.
9. We don't call the CFO the chief financ-*ing* officer, so we should stop calling the CMO the chief market-*ing* officer and think of them as the \_\_\_\_\_ instead.
10. The chief **market** officer (select the best three answers):
  - Owns the seat at the table that understands the market
  - Defines how the company will package and price its offerings
  - Translates market understanding into alignment
  - Is the "cheerleader" for the C-Suite
  - Delivers market-leading experiences for customers
  - Must be able to perform the job of anyone on their staff

# TIME TO PLAY OFFENSE

11. For CMOs, playing offense means:
  - Taking ownership of the market on behalf of the company
  - Initiating collaboration with the C-Suite to redefine the role
  - Insisting on a seat at the table
  - Creating a team that will own the market, regardless of what the CEO thinks
12. CMOs who are able to make the shift to chief market officer have something in common. They're all \_\_\_\_\_.
13. According to a McKinsey study, high-growth companies are \_\_\_\_\_ times more likely to have a unifier-type CMO.

14. CMOs can differentiate themselves in four key areas. **List them:**

1. \_\_\_\_\_ 3. \_\_\_\_\_  
2. \_\_\_\_\_ 4. \_\_\_\_\_

## OWNING THE STRATEGIC PLAN

15. A CMO can set themselves apart by owning the company's strategic plan: a living, breathing, time-bound plan of what the company must do to win. A great tool for developing a well-articulated, focused, and prioritized plan is called \_\_\_\_\_.

16. V2MOM stands for: \_\_\_\_\_

17. V2MOM isn't for \_\_\_\_\_; it's about \_\_\_\_\_.

## V2MOM COMPONENTS AND DEFINITIONS

### Component Definition

**Vision** Defines what you want to do or achieve

**Values** Principles and beliefs that help you pursue the vision.

**Methods** Actions and steps to get the job done.

**Obstacles** Challenges, problems, and issues you have to overcome to achieve the vision.

**Metrics** Measurable results you aim to achieve

18. **Select the correct statement:**

- V2MOM methods should all have equal priority, so only define what you can accomplish
- V2MOM is a great framework for running the day-to-day business
- V2MOM methods should be ranked to prioritize importance
- V2MOM was developed by Steve Wosniak when he was at Apple

19. In the book, Latané makes a slight tweak to her V2MOM model. What is it?

- She replaces Obstacles with Owner.
- She replaces Metrics with Microfocus.
- She replaces Methods with Mindfulness.
- She replaces Values with Vigilance.

20. **True/False (circle the correct answer)**

Once completed, it is important that the V2MOM is only communicated with the executive team as it is a living, breathing document that needs to be updated frequently and may confuse employees.

## PRACTICE EXERCISE: CREATE A V2MOM FOR YOUR ORGANIZATION

First, remember what a V2MOM is designed to do. It should:

- Set out a clear goal, then specify and prioritize what is needed to achieve that goal
- Drive alignment across the company
- Build momentum, passion, and the right mindset
- Identify the capabilities needed for success

<p><b>Define your Vision</b> Ask yourselves: What do you want?</p> <p>Your vision should:</p> <ul style="list-style-type: none"><li>• Be aspirational</li><li>• Be time-bound</li><li>• Highlight what's new or different</li><li>• Show visible success</li></ul>	<p><b>VISION:</b></p> <hr/> <hr/> <hr/> <hr/>
<p><b>Define your Values</b> Ask yourselves: Why is this important?</p> <p>Your values should:</p> <ul style="list-style-type: none"><li>• Embody your beliefs and guiding principles</li><li>• Be prioritized by order of importance</li><li>• Provide a good gut check</li></ul>	<p><b>VALUES:</b></p> <hr/> <hr/> <hr/> <hr/>
<p><b>Establish your Methods</b> Ask yourselves: How are you going to do it?</p> <p>Your methods should:</p> <ul style="list-style-type: none"><li>• Outline actions and inspiration</li><li>• Be prioritized to help make decisions</li><li>• Be measurable</li></ul>	<p><b>METHODS:</b></p> <hr/> <hr/> <hr/> <hr/>
<p><b>Define your Owners</b> Ask yourselves: Who will drive each method?</p> <p>Your owners should:</p> <ul style="list-style-type: none"><li>• Have sole responsibility for the progress of each method</li><li>• Call upon other resources as needed</li><li>• Report regularly on progress</li><li>• Be passionate about the method and what it will deliver</li></ul>	<p><b>OWNERS:</b></p> <hr/> <hr/> <hr/> <hr/>
<p><b>Establish your Metrics</b> Ask yourselves: How will you know if you're successful?</p> <p>Your metrics should:</p> <ul style="list-style-type: none"><li>• Have a specific impact (done is not a great metric)</li><li>• Answer the right questions</li><li>• Be listed in consumable chunks</li><li>• Be easily reportable</li></ul>	<p><b>METRICS:</b></p> <hr/> <hr/> <hr/> <hr/>

## PUTTING YOUR V2MOM TO WORK

21. True/False (circle one)

Once you and your executive team have agreed upon your V2MOM, you can also create separate V2MOMs for all the functional teams.

22. You will need to review, revisit, and revise with a frequency that makes sense for your business and industry. **Complete this example schedule:**

Every \_\_\_\_\_: Provide updates on all V2MOMs – departmental and organizational – to the whole company.

Every \_\_\_\_\_: Do an overall status update on all V2MOMs. Were the goals too aggressive? Not aggressive enough? Now's the time to either remove some methods or add new ones if you're killing the ones you've already committed to.

Every \_\_\_\_\_: Create a new V2MOM.



**TIP:** Review pages 38 and 39 in your book for more on creating your V2MOM.

## CUSTOMER INSIGHTS

23. Truly understanding the market requires a mastery of customer insights. Without real insights, marketers are forced to rely on tools like \_\_\_\_\_ and \_\_\_\_\_.

24. Two critical insights that must be developed are an understanding of your TAM and your ICP. **Define these two acronyms and their meaning:**

TAM: \_\_\_\_\_

ICP: \_\_\_\_\_

25. By utilizing account insights produced by Big Data and AI, you not only see which accounts are an ideal fit for your solution, but also which ones are actively in-market, allowing you to further refine your ICP to understand your commercial opportunity right now: your TAIM and your IICP. **Define these two acronyms and their meaning:**

TAIM: \_\_\_\_\_

IICP: \_\_\_\_\_

26. Developing your IICP offers many benefits. **List three:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## CATEGORY DESIGN

27. Category design is the discipline of creating and monetizing new markets in a noisy world. To do it right, you need a differentiated message and a strong point of view. One way to develop both of those is by creating a great narrative. **Label the following:**

	The undeniable shift in the world that creates both (a) big stakes and (b) huge urgency for change.
	Name the customers' challenges in relation to moving from the old world to the new.
	Present a teaser vision of the happily-ever-after that will be achieved.
	Position capabilities in the context of transitioning from the old world to a new world.
	Present evidence of our ability to deliver happily-ever-after.

28. Part of being a category king is conditioning the market to \_\_\_\_\_.

- Evangelize your message
- Think like you
- Make your brand synonymous with your product (e.g. Kleenex)
- Understand that premium price means premium quality

29. Your message needs to be consistent both inside and outside of the organization. One way to do that is with a message map. A message map is a tool that makes it easy for everyone in the organization – from content writers, to sales people, to the CEO – to anchor their messages around the \_\_\_\_\_, \_\_\_\_\_ themes you've determined to be \_\_\_\_\_.

The message map facilitates message consistency by tracing specific language to the story you want to tell – and it always ladders up to the main, overarching message of your brand. **Complete the following exercise to build out your message map.**

State the large industry shift that's going on and what your solution offers that every potential customer is trying to achieve.	<b>INDUSTRY SHIFT</b> <hr/> <hr/> <hr/> <hr/> <hr/>	<b>EVERY COMPANY IS TRYING TO:</b> <hr/> <hr/> <hr/> <hr/> <hr/>			
↓ WHAT FACTORS ARE CONTRIBUTING TO THE STRUGGLE? ↓					
Name the ways your customers struggle to evolve to that shift.	<b>COMPANIES STRUGGLE TO EVOLVE</b> <hr/> <hr/> <hr/> <hr/> <hr/>	<b>FACTOR #1</b> <hr/> <hr/> <hr/> <hr/> <hr/>	<b>FACTOR #2</b> <hr/> <hr/> <hr/> <hr/> <hr/>	<b>FACTOR #3</b> <hr/> <hr/> <hr/> <hr/> <hr/>	<b>FACTOR #4</b> <hr/> <hr/> <hr/> <hr/> <hr/>
↓ WHAT CHALLENGES REMAIN DUE TO NOT BEING ABLE TO MEET THOSE STRUGGLES AND EVOLVE? ↓					
List the challenges that your customers face as a result of each of those struggles.	<b>MOST COMPANIES EXPERIENCE AT LEAST ONE OF THESE</b> ➤	<b>CHALLENGE #1</b> <hr/> <hr/> <hr/> <hr/> <hr/>	<b>CHALLENGE #2</b> <hr/> <hr/> <hr/> <hr/> <hr/>	<b>CHALLENGE #3</b> <hr/> <hr/> <hr/> <hr/> <hr/>	<b>CHALLENGE #4</b> <hr/> <hr/> <hr/> <hr/> <hr/>
↓ HOW DOES YOUR SOLUTION SOLVE THESE CHALLENGES? ↓					
For each listed challenge, identify the ways your solution helps your customers meet the challenge.	<b>OUR SOLUTION</b> <hr/> <hr/> <hr/> <hr/> <hr/>	<b>CAPABILITY #1</b> <hr/> <hr/> <hr/> <hr/> <hr/>	<b>CAPABILITY #2</b> <hr/> <hr/> <hr/> <hr/> <hr/>	<b>CAPABILITY #3</b> <hr/> <hr/> <hr/> <hr/> <hr/>	<b>CAPABILITY #4</b> <hr/> <hr/> <hr/> <hr/> <hr/>
↓ WHAT DIFFERENTIATES YOUR SOLUTION FROM OTHERS? ↓					
Establish what sets your solution apart from others your potential customers could choose from.	<b>WHAT SETS US APART</b> <hr/> <hr/> <hr/> <hr/> <hr/>	<b>DIFFERENTIATOR #1</b> <hr/> <hr/> <hr/> <hr/> <hr/>	<b>DIFFERENTIATOR #2</b> <hr/> <hr/> <hr/> <hr/> <hr/>	<b>DIFFERENTIATOR #3</b> <hr/> <hr/> <hr/> <hr/> <hr/>	<b>DIFFERENTIATOR #4</b> <hr/> <hr/> <hr/> <hr/> <hr/>



**TIP:** Review **page 49** in your book for more detail on filling out the Message Map.

Now that you have completed your message map, **fill in the following:**

Because of \_\_\_\_\_, every company is trying to  
(Industry shift)  
\_\_\_\_\_. However, many struggle and continue to  
("Every company is trying to" language)  
\_\_\_\_\_, leading to  
(Factor #1)  
\_\_\_\_\_. \_\_\_\_\_ solves  
(Challenge #1) (Solution name)  
this problem by \_\_\_\_\_. What's unique about our approach  
(Solution #1)  
is \_\_\_\_\_.  
(Differentiator #1)

## DEVELOP YOUR MARKETECTURE

The nature of agile development (incremental improvement) is essential from a time-to-market perspective, but it's tough to get customers and potential customers jazzed about little things. Here's one way to combat that: Instead of coming up with a marketecture that represents a current state, create a vision for the future — one that customers, investors, future customers, and your team can look at and understand where you're headed as a company.

30. List the five guiding principles of developing a future-looking marketecture.

1. \_\_\_\_\_. Decouple the "product roadmap" from the marketecture. Think blueprint, not roadmap, and include big buckets of capabilities customers will need in order to reach the promised land.
2. \_\_\_\_\_. Err on the side of simplicity rather than trying to include every differentiator, what each feature means to each persona, and so forth.
3. \_\_\_\_\_. Communicate the value of going from status quo to the promised land. This is critical to unlocking budget and answering, "Why now?"
4. \_\_\_\_\_. Make this a vision for the category, not a description of what you do today.
5. \_\_\_\_\_. Don't let things drag out. Look toward a customer conference or sales kickoff to force your team to have the point-of-view and category blueprint ready to go.

31. Label the following table.

<ul style="list-style-type: none"> <li>• Product development plan</li> <li>• Includes new features and enhancements</li> <li>• 3-6 month view</li> </ul>	<ul style="list-style-type: none"> <li>• Easy-to-digest visualization of your product's capabilities today</li> <li>• Bubbles features up into capabilities customers need</li> <li>• Non-technical language</li> <li>• 12-18 month view</li> </ul>	<ul style="list-style-type: none"> <li>• Visualization of the future of the category</li> <li>• Shows your capabilities and the supporting ecosystem</li> <li>• Inspires what is possible</li> <li>• 18-24 month view</li> </ul>



**TIP:** Review pages 52 and 53 in your book for examples of 6sense's marketecture and category design.

## CULTURE

The next, and final element that every great CMO needs to enable and embody is culture. The CMO needs to be the cheerleader not only for the brand and category, but for the company as a whole.

32. A great culture fosters \_\_\_\_\_ that binds people behind a single purpose, a mission that can create a once-in-a-career high for employees, partners, and customers.
33. A company's leadership sets the tone for the whole organization. As an executive, one of the most important things you can do is embrace the idea of:
- First Mover Advantage
  - First Principles
  - First Team
  - First Priorities

34. A healthy, united \_\_\_\_\_ makes it possible for the \_\_\_\_\_ to create a culture that permeates every team and every department within the company.
35. In the book, Latané confesses her favorite week of the year is field kickoff (sometimes called sales kickoff or commercial kickoff). A well-run FKO is a chance to get everyone on the same page in terms of:
- Territories, projections, quotas
  - Sales targets, tactics, comp plans
  - Brand, message, culture
  - Revenue, strategy, V2MOM
36. FKOs serve an irreplaceable business function: to get sales and marketing seamlessly aligned, and to remind us all that \_\_\_\_\_, including the leadership team.
37. Trust is essential to a positive and productive company culture. The foundation for that trust is: \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_.
38. **True/False (circle the correct answer)**
- Transparency can be a double-edged sword. Leaders need to be wary of being overly transparent with rank-and-file employees, as it can have negative consequences like speculation and “hallway commandos.”
39. You’ve done the hard work of defining your V2MOM and your point-of-view. Next step?
- Pressure-test it
  - Live it
  - Codify it
  - Compare it to industry peers

# CHAPTER 2

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## TERMINOLOGY

Draw a line to match the term with its definition.

Category Design ●

First Team ●

IICP ●

Marketecture ●

Message Map ●

TAIM ●

V2MOM ●

- A high-level representation of software or hardware architecture that has been designed with market requirements.
- The total commercial opportunity available right now.
- A framework and organizational alignment tool used to create compelling, relevant messages and ensure message consistency.
- The people you champion first, build up and support first, and align with first.
- A living, breathing, time-bound plan of what the company must do to win.
- The discipline of creating and monetizing new markets in a noisy world.
- The best, most-likely-to-be-won commercial opportunities.

# CHAPTER 2

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## ANSWER KEY

1. Their marketing leads possess the business acumen or leadership skill their role requires
2. Eliminating the role of CMO altogether
3. 3.5 years
4. Month-to-month; Quarter-to-quarter
5. Long-view
6. Brand, experience, and growth
7. Are the reason it's so hard for CMOs to prioritize their efforts
8. Verbing
9. Chief market officer
10. Owns the seat at the table that understands the market; Translates that understanding into alignment; Delivers market-leading experiences for customers
11. Taking ownership of the market on behalf of the company
12. Unifiers
13. 7
14. Strategy; Customer insights; Category design; Culture
15. V2MOM
16. Vision, Values, Methods, Obstacles, Metrics
17. Maintaining the status quo; Changing the business for the better
18. V2MOM methods should be ranked to prioritize importance
19. She replaces Obstacles with Owner
20. False
21. True
22. Two weeks; Six months; Year
23. Persona interviews; Guesswork
24. Total Addressable Market (TAM): This is the entire universe of opportunities available to you – every potential customer for your solution. Ideal Customer Profile (ICP): When you narrow your TAM down to the companies that are a perfect fit for your solution – meaning most likely to buy, most likely to be profitable, and most likely to be successful – you have your ICP.
25. Total Addressable In-Market (TAIM): The total commercial opportunity right now. In-Market Ideal Customer Profile (IICP): The best, most-likely-to-be-won commercial opportunities.
26. Gives you confidence that you aren't wasting time and money; Makes it possible to create a great prospect experience that doesn't rely on forms, spam, and cold calls; Enables you to deliver the right message, to the right account, at the right time; Puts marketing as close to the customer as possible
27. (L to R) The Big Trend; Name the Enemy; Tease the Promised Land; Capabilities are Key; Proof

# ANSWER KEY (CONTINUED)

- 28. Think like you
- 29. Centralized; Consistent; Your most effective messaging strategy
- 30. Don't get lost in the weeds; Don't think of marketecture as a sales asset; Be sure to quantify; Include partnerships and potential mergers and acquisitions; Never waste a deadline
- 31. Roadmap; Marketecture; Category design
- 32. A sense of community
- 33. First Team
- 34. First Team; unifier-type CMO
- 35. Brand, message, culture
- 36. We're on the same team
- 37. Honesty; Openness; Transparency
- 38. False
- 39. Live it

## **Category Design**

The discipline of creating and monetizing new markets in a noisy world.

## **First Team**

The people you champion first, build up and support first, and align with first.

## **IICP**

Accounts identified as the best, most-likely-to-be-won commercial opportunities.

## **Marketecture**

A high-level representation of software or hardware architecture that has been designed with market requirements.

## **Message Map**

A framework and organizational alignment tool used to create compelling, relevant messages and ensure message consistency.

## **TAIM**

The total commercial opportunity available right now.

## **V2MOM**

A living, breathing, time-bound plan of what the company must do to win.

# CHAPTER 2

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## DOWNLOADABLE TEMPLATES & RESOURCES



### FORMS

- V2MOM Worksheet
- Message Map Worksheet



### VIDEOS

- Sales & Marketing Alignment & Tech - Coreview

## NOTES

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# CHAPTER 3

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## BUILDING THE CUSTOMER-FIRST TECH STACK

### CHAPTER SUMMARY

Now it's time to roll up our sleeves and dig into the capabilities needed in the tech stack to deliver the insights, collaboration, and data that are required to deliver a truly customer-centered buying experience. With a focus on engaging accounts over leads, Latané walks through her 5-step approach to executing ABM at scale and untangles the crazy martech landscape to focus on the core capabilities every organization needs to make it a reality. It all comes together as Latané shares how one customer put the approach and capabilities into action, enabling them to – in their words – “print pipeline.”

### KEY TAKEAWAYS

- To improve the customer experience, we need an overarching strategy based on insights and knowledge. However, this is often missing because sales and marketing teams don't know where to start when it comes to understanding the key capabilities needed to truly deliver on customer-first experience.
- Building a customer-first tech stack has a purpose: We must continually reimagine and improve our customer experience, because our goal is predictable revenue growth.
- A buyer's experience with your brand spans from their first touchpoint to customer success and renewals. A thoughtful, comprehensive experience yields solid, quantifiable rewards across the journey – from accelerated decision making in the early stages to increased customer loyalty over time.
- Sellers and marketers feel overwhelmed when it comes to actually implementing ABM. They have to wade through a vendor marketplace filled with hype and confusion.
- There are eleven essential capabilities you need to build a customer-first tech stack, as you grow and scale your ABM programs.

# DESTINATION: PREDICTABLE REVENUE GROWTH

## LEAD-BASED MARKETING

Marketing generates and nurtures leads for sales.

## ACCOUNT-BASED MARKETING

Marketing targets campaigns to select accounts to proactively generate leads.

## ORCHESTRATED ACCOUNT ENGAGEMENT

Sales and marketing use AI to align on the best accounts to target, and then seamlessly deliver engaging experiences throughout the customer journey.

"BY 2025, B2B DEMAND GENERATION EFFORTS WILL FOCUS PREDOMINANTLY ON ACCOUNTS, NOT LEADS."

-FORRESTER

# KNOWLEDGE-BUILDING PRACTICE & EXERCISES

1. Many organizations lack an overarching strategy for improving customer experience, leaving sales and marketing teams wondering where to start. This is often due to lack of a strategy based on:
  - Insights and knowledge
  - The company V2MOM
  - Market research
2. The truth is that we can light up the Dark Funnel™ to create an engaging and positive customer experience. But the trick is we need the right \_\_\_\_\_ to make it all happen.
3. Predictable revenue growth is our goal, yet only \_\_\_\_\_ of organizations met over 100% of their revenue goals in 2019.
  - 25%
  - 32%
  - 10%
  - 18%

# ACCOUNTS > LEADS

4. A primary hurdle to overcome in providing a customer-first experience is recognizing a key way in which buying has changed. Today, we know that there are \_\_\_\_\_ people involved in every complex B2B buying decision.
- An unknown number of  2 or 3  
 10 or more  Disinterested
5. A key step that many companies take when seeking to identify and target the right customers – and to connect with them in the right way at the right time – is to make the switch from \_\_\_\_\_ to \_\_\_\_\_.
6. A shift to an account-centric approach relies on knowledge and insight about an account to:
- Develop promotional offers that get noticed  
 Create targeted, highly personalized outreach  
 Eliminate the need for “leads” and “contacts”  
 Ensure marketing and sales are on the same page
7. Even after making the shift to ABM, nearly \_\_\_\_\_% are still mostly focused on generating leads (MQLs or SQLs). Yet, in a Heinz Research report, \_\_\_\_\_% said they believe their lead scoring process is broken.

# WHERE ABM FALLS SHORT

8. One of the biggest reasons marketers fail to see positive results from ABM is that it’s really hard to:
- Scale  Measure  
 Operationalize  Turn off “leads”
9. Those trying to implement ABM cite many reasons for their struggles including:
- Orchestrating ABM across \_\_\_\_\_ is challenging.
  - They’re not confident their data enables \_\_\_\_\_ or engagement.
  - They don’t have \_\_\_\_\_, including in-market readiness as well as what they care about.
  - They lack confidence in the structure and alignment of their \_\_\_\_\_.
  - They don’t know which \_\_\_\_\_ will best engage target accounts, what \_\_\_\_\_ to reach them through, or which accounts to \_\_\_\_\_ in the first place.

10. What are the two breakthroughs Latané shares from her first attempt at ABM?

1. \_\_\_\_\_

2. \_\_\_\_\_

## BACK TO BASICS

11. Successfully implementing ABM comes down to a simple 5-step process — and each of those five steps can only work with the right technology. List the five fundamental steps of an account-based strategy.

Step 1: \_\_\_\_\_

Step 2: \_\_\_\_\_

Step 3: \_\_\_\_\_

Step 4: \_\_\_\_\_

Step 5: \_\_\_\_\_

## TIME TO GET TECHY

12. The no forms, no spam, no cold calls philosophy can be transformational, but there are some very specific capabilities needed to make it happen. List the eleven essential things your tech stack must be able to do.

Capability #1: \_\_\_\_\_

Capability #2: \_\_\_\_\_

Capability #3: \_\_\_\_\_

Capability #4: \_\_\_\_\_

Capability #5: \_\_\_\_\_

Capability #6: \_\_\_\_\_

Capability #7: \_\_\_\_\_

Capability #8: \_\_\_\_\_

Capability #9: \_\_\_\_\_

Capability #10: \_\_\_\_\_

Capability #11: \_\_\_\_\_

Capability #12: \_\_\_\_\_

Capability #13: \_\_\_\_\_

13. CDPs break down data silos, deduplicate and normalize records, and cleanse data to provide a single source of rich, accurate account data that we can take action on. From the list below, select the types of business data we can use to put the customer first.

- Personal address information: street address, or email address
- Firmographic and technographic account data from internal systems and third-party sources
- Buyer intent data from first- and third-party websites
- Information on race and religious preferences
- Browser history and shopping preferences
- Known and anonymous website traffic data
- Social security number, passport number, driver's license
- Email, call, and meeting data from CRM and MAP
- Opportunity data from CRM
- Digital ad campaign metrics like accounts reached and results



**TIP:** For an overview of how CDPs work, **watch the video** “MakingSense of CDPs” in the Certification Hub.

14. By combining, cleaning, and organizing this critical but disparate data, we can:

- Eliminate the need to prospect because we know what prospects want
- Identify which prospects are promoters and which are detractors
- Bypass traditional business channels and reach prospects through their personal channels
- Extract meaningful trends and insights to guide decisions

15. Intent data offers a path forward for sellers and marketers because intent solutions are designed to capture buying signals from both \_\_\_\_\_ and \_\_\_\_\_ buyers.

16. Intent signals come from both first-, second-, and third-party interactions. List three sources of first-party intent.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

17. Second-party intent data comes from sites you don't own, but whose content and conversations are about your company, including review sites like \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_.

18. Third-party intent can come from many sources. Which of these are considered sources of third-party intent? (Select all that apply)

- Company Twitter feed
- Search engines
- Salesforce
- Blogs
- Trade publications
- Forums
- Communities
- Product review sites
- Marketo
- LinkedIn Navigator

19. Pre-intent data signals that a buyer may be entering the market at a predictable future point. Based on historical data, AI can make predictions about what companies will buy and when by using what types of data? (select all that apply)

- Form fill data
- Technographic data
- Historical stock price data
- Psychographic data
- Personal data
- Geographic data
- Market updates
- Contact data

20. True/False (circle the correct answer)

Regardless of the exact method used, it's critical that you are able to capture both first-, second- and third-party intent signals, as well as pre-intent signals.



**TIP:** For more on Intent Data, watch the video "MakingSense of Intent Data" in the Certification Hub.

21. Matching anonymous intent signals to accounts is fundamental for an orchestrated account engagement strategy. Why?

- Because you can't run programs to accounts; you need to identify a real person as your buyer.
- Because the quality and success of your campaigns is directly tied to the quality and completeness of your account data.
- Because regulations like GDPR and CCPA require IP de-anonymization.
- Because there is no way to use intent data if we don't know what persona is creating the data.



**TIP:** To learn more about the importance of Match Rates, watch the video "MakingSense of Match Rates" in the Certification Hub.

22. True/False (circle the correct answer)

Regulations like GDPR and CCPA don't really apply to the collection and use of intent data since there is no correlation between the data being collected and an individual's personally identifiable information (PII).

23. The most common way to match intent to an account is via the IP address, but there are others.

Name two.

1. \_\_\_\_\_

2. \_\_\_\_\_



**TIP:** Review "Putting Account Matching Vendors to the Test" on page 74 to learn more about evaluating vendor "match rate" claims.

24. A CDP filled with Big Data doesn't give us deep customer insights on its own. For that we need AI-driven predictions, which rely on historical and real-time behavioral data to help us understand which signals are relevant and predict future outcomes. We can break these predictive capabilities down into four essential predictive models. List them below.

Predictive Model #1: \_\_\_\_\_

Predictive Model #2: \_\_\_\_\_

Predictive Model #3: \_\_\_\_\_

Predictive Model #4: \_\_\_\_\_

25. For segmentation purposes, you will need to further enrich your data with third-party data sources. Third-party data is generally a catchall term for three types of data relevant to every business. Label the following data types below.

\_\_\_\_\_ : an account's industry, location, revenue, and size

\_\_\_\_\_ : platforms and other technology an account has invested in

\_\_\_\_\_ : title, phone number, email, and address

26. There are many third-party data providers to choose from, and some data will undoubtedly be inaccurate. Best-in-class account-based tech stacks use \_\_\_\_\_ to determine which data to use when enriching records, taking the guesswork (and manual effort) out of enrichment.

27. Unlike other capabilities, data segmentation capabilities can be obtained from multiple vendors, including those that specialize in CDPs, intent data, and orchestration. It is called out as a separate capability because:
- Data segmentation means different things to different vendors
  - It's vitally important that sales and marketing can quickly build target audiences
  - Proper segmentation requires a deep integration with your CRM, so it matters what vendor you choose
  - Segmentation is only as good as the account identification capabilities of the vendor
28. From the options below, select the recommended requirements for data segmentation.
- Self-service
  - Fully integrated
  - Role-based
  - Simple, easy to use
  - Allows for list uploads
  - Fast
  - Integrated with BI tools for analysis
  - Able to create static or dynamic segments
29. If our goal is to seamlessly engage the right buyers from the right accounts with the right message at the right time – and to do so across every channel at scale – we need:
- Intent data
  - Sales & marketing alignment
  - Orchestration
  - Message maps
30. Orchestration begins with dynamic data segmentation to allow tactics and personalization to fire based on buyer behavior, which is \_\_\_\_\_.
31. Examples of actions we might orchestrate for accounts within a segment could include **(select all that apply)**:
- Automatically serving a dynamic display campaign
  - Personalizing the website with industry-specific elements
  - Alerting sales reps by Slack or email when one of their accounts is showing increased engagement
  - Customizing content hub experiences with company logos and industry-relevant content
  - Recommending content based on buying stage or intent keyword
  - Automatically acquiring missing buying center data from third-party sources
  - Adding accounts to other systems like CRM, MAP, or a sales engagement platform
  - Sending a gift or other direct mail to key personas

32. Digital display advertising is one of the most important channels, as it makes it possible to reach potential B2B buyers just about anywhere across the Internet. Your account-based display advertising technology should offer which of the following capabilities? (select all that apply)

- List management
- Self-service
- Ability to hyper-target
- Opt-in/out functionality
- Ability to experiment
- Persona/role targeting
- Robust metrics
- Built-in creative studio



**TIP:** Watch the video “MakingSense of Display Advertising” in the Certification Hub.

33. A world of email possibilities is now opening up to marketers and sellers that goes far beyond standard MAP and mail merge capabilities, thanks in part to the major leaps in \_\_\_\_\_ and \_\_\_\_\_ that have occurred in the past couple of years.

34. AI allows us to automate emails that are responsive and conversational by: (select all that apply)

- Designing campaigns
- Timing and pacing our email sends
- Understanding responses
- Developing your marketecture
- Making smart decisions about how to route, respond, and multithread
- Alerting sellers or marketers when it's time to get involved in threads

35. The goal for your account-based advertising efforts should be:

- Clicks
- Leads
- Website views
- Account engagement

36. Personalized web and content experiences are vital for engaging with B2B buyers. If we're serious about putting the customer first, this is when we put our best foot forward by personalizing their web or content experience based on \_\_\_\_\_.

37. Personalization can come in many forms – from customized imagery and content based on industry, to adding an account's logo and welcome message to your home page. Whatever form it takes, you want to \_\_\_\_\_, but you don't want to seem \_\_\_\_\_.

38. True/False (circle the correct answer)

Personalization doesn't stop at web and content experiences. It can extend to every channel: email, direct mail, advertising, web, content, sales engagement, chat, and so on.



**TIP:** Watch the video "MakingSense of Personalization" in the Certification Hub.

For each channel below, provide your own example of how you would deliver a great experience through personalization.



**TIP:** Review the examples on page 84 for inspiration.

Chatbot:

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Content hub:

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High-value offers:

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39. The goal of sales insights is to enable sales reps to prioritize the leads, accounts, and contacts they spend their time on, and also to ensure that their outreach is timely and relevant. These insights must be easy to access and must \_\_\_\_\_.

40. The best way to deliver sales insights to reps is to do so within your CRM so that anytime a rep looks up an account, they can quickly access critical information like **(select all that apply)**:

- Predicted buying stage
- Makeup of the buying center
- Keywords being researched
- Which contacts have been engaged and which haven't
- Level of account engagement

41. Knowing which accounts to prioritize and having insights about them is important, but today's AI-powered tech is able to recommend the next best action to take in order to increase engagement with an account. Provide an example of an AI-driven next best action recommendation:

---

42. Account-centric measurement capabilities in your tech stack will make it that much easier to start baselining and improving results. List the three steps to ensure we continue improving our ability to deliver a customer-first approach:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

43. Legacy metrics are becoming less relevant as they don't paint a full picture of how accounts are engaging with our brand. Fill in the following table with the right account engagement metrics.

Legacy Metrics	Account Engagement Metrics
Click-through rate (CTR)	
Cost per click (CPC)	
Number of impressions	
Number of clicks	
Number of leads	
Marketing-qualified leads (MQLs)	
Pipeline attribution	
Conversion rate	
Pageviews	
Contacts reached	
Number of leads processed	



**TIP:** For more on how the right tech stack can deliver breakthrough results, review the case study “How PTC Transformed Business with the Right Tech Stack” on **page 92**.

44. Sales leaders have long had the tools to accurately manage and predict revenue, but marketers have had to deal with \_\_\_\_\_ and \_\_\_\_\_ both in forecasting and measuring pipeline.
45. Modern pipeline intelligence technology allows marketers to do what three things?
1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_

# CHAPTER 3

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## TERMINOLOGY

Draw a line to match the term with its definition.

- Predictable Revenue Growth ●
- Buying Committee ●
- Customer Data Platform (CDP) ●
- Intent Data ●
- Account Identification ●
- AI-Driven Predictions ●
- Third-Party Data ●
- Data Segmentation ●
- Orchestration ●
- Personalization ●
- Sales Insights ●
- Analytics ●
- First-Party Data ●
- Predictive Model ●

- The process of dividing and grouping similar data together based on chosen parameters in order to use it more efficiently to target specific audiences.
- The collection of behavioral buying signals that help interpret B2B purchase intent.
- Data collected from a variety of sources by a company with no direct connection to the account whose data is collected. Sources may include websites, social media networks, blogs, and subscriptions.
- Data collected from direct interaction with your prospects and customers. This includes data collected from your website, visitor analytics software, your CRM, MAP, and any other in-house systems used to collect identifiable user data.
- The outcome of using known results to create, process, and validate a model that can be used to forecast future outcomes.
- A group of individuals — each with a distinct buying job to complete — who collaborate to manage a complex B2B purchase process.
- The act of tailoring an experience or communication based on rich account insights.
- The ability to deanonymize website traffic by matching IP address or other identifying data to an account.
- Account information available to sales reps to help them prioritize the accounts and contacts they spend their time on and ensure their outreach is timely and relevant to prospects.
- Account-centric measurement capabilities in your tech stack.
- The ability to automate the delivery of the right content, on the right channel, to the right contacts in your target accounts, at the right time.
- A framework to create consistency year-over-year and provide business growth based on a formulaic process.
- The output of an algorithm after it has been trained on historical data, applied to new data when forecasting the likelihood of a particular outcome.
- A persistent, unified customer database pulled from multiple sources, cleaned, and combined to create a single customer profile accessible to other systems.

# CHAPTER 3

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## ANSWER KEY

1. Insights and knowledge
2. Technology
3. 18%
4. 10 or more
5. Lead-based marketing; Account-based marketing (ABM)
6. Create targeted, highly personalized outreach
7. 60; 50
8. Scale
9. Multiple channels and tools; Strategic account-driven decision making; A singular view of their accounts; Sales territories; Messages; Channels; Prioritize
10. ABM is impossible without the right technology; In order to be cost-effective, ABM must be scalable and repeatable
11. Select the best accounts; Know about them; Engage the right way; Collaborate with sales; Track real stuff
12. Customer data platform (CDP); Intent data; Account identification; AI-driven predictions; Third-party data; Data segmentation; Orchestration; Display advertising; Email; Personalization; Sales insights; Analytics; Pipeline Intelligence
13. Firmographic and technographic account data from internal systems and third-party sources; Buyer intent data from first- and third-party websites; Known and anonymous website traffic data; Email, call, and meeting data from CRM and MAP; Opportunity data from CRM; Digital ad campaign metrics like accounts reached and results
14. Extract meaningful trends and insights to guide decisions
15. Known; Anonymous
16. Company's website; CRM; MAP
17. TrustRadius, Capterra, and G2
18. Search engines; Blogs; Trade publications; Forums; Communities; Product review sites
19. Technographic data, Psychographic data, Market updates
20. True
21. Because the quality and success of your campaigns is directly tied to the quality and completeness of your account data
22. False
23. Mobile advertising ID; Cookies
24. ICP insights/account fit; Contact fit; Contact engagement; Identifying in-market accounts
25. Firmographic data; Technographic data; Contact data
26. Voting algorithms
27. Segmentation is only as good as the account identification capabilities of the vendor
28. Self-service; Simple, easy to use; Fast; Able to create static or dynamic segments

# ANSWER KEY (CONTINUED)

- 29. Orchestration
- 30. Not static – it changes all the time
- 31. All are examples of actions we might orchestrate
- 32. Self-service; Ability to hyper-target; Ability to experiment; Persona/role targeting; Robust metrics
- 33. Machine learning; Natural language processing
- 34. Does not apply: Designing campaigns; Developing your marketecture
- 35. Account engagement
- 36. All the rich data we have in our CDP
- 37. Add value to every interaction; Creepy
- 38. True
- 39. Inspire action
- 40. All are ways to deliver sales insights
- 41. Examples could include: Specific contacts to begin outreach; Talking points based on interest and behavior; New contacts to add to the buying center
- 42. Measure; Test; Optimize.
- 43. View-through rate (VTR); Cost per result (CPR); Number of accounts reached; Number of accounts engaged; Number of ICP accounts; Number of accounts in-market; Conversion of accounts in-market to pipeline and revenue; Account engagement score; Relevant content consumed; Buying team engagement; Account velocity through buying stages
- 44. Disconnected data; A lack of tech capabilities
- 45. Plan; Track; Forecast

## **Predictable Revenue Growth**

A framework to create consistency year-over-year and provide business growth based on a formulaic process.

## **Buying Committee**

A group of individuals – each with a distinct buying job to complete – who collaborate to manage a complex B2B purchase process.

## **Customer Data Platform (CDP)**

A persistent, unified customer database pulled from multiple sources, cleaned, and combined to create a single customer profile accessible to other systems.

## **Intent Data**

The collection of behavioral buying signals that help interpret B2B purchase intent.

## **Account Identification**

The ability to deanonymize website traffic by matching IP address or other identifying data to an account.

## **AI-Driven Predictions**

The output of an algorithm after it has been trained on historical data, applied to new data when forecasting the likelihood of a particular outcome.

**Third-Party Data**

Data collected from a variety of sources by a company with no direct connection to the account whose data is collected. Sources may include websites, social media networks, blogs, and subscriptions.

**Data Segmentation**

The process of dividing and grouping similar data together based on chosen parameters in order to use it more efficiently to target specific audiences.

**Orchestration**

The ability to automate the delivery of the right content, on the right channel, to the right contacts in your target accounts, at the right time.

**Personalization**

The act of tailoring an experience or communication based on rich account insights.

**Sales Insights**

Account information available to sales reps to help them prioritize the accounts and contacts they spend their time on, and ensure their outreach is timely and relevant to prospects.

**Analytics**

Account-centric measurement capabilities in your tech stack.

**First-Party Data**

Data collected from direct interaction with your prospects and customers. This includes data collected from your website, visitor analytics software, your CRM, MAP, and any other in-house systems used to collect identifiable user data.

**Predictive Model**

The outcome of using known results to create, process, and validate a model that can be used to forecast future outcomes.

# CHAPTER 3

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## DOWNLOADABLE TEMPLATES & RESOURCES



### VIDEOS

- MakingSense of CDPs
- MakingSense of Intent Data
- MakingSense of Match Rates
- MakingSense of Display Advertising
- MakingSense of Personalization



### EBOOKS / ARTICLES

- Case Study: How PTC Transformed Business with the Right Tech Stack

## NOTES

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# CHAPTER 4

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## OUR BOLD NEW VISION IN ACTION

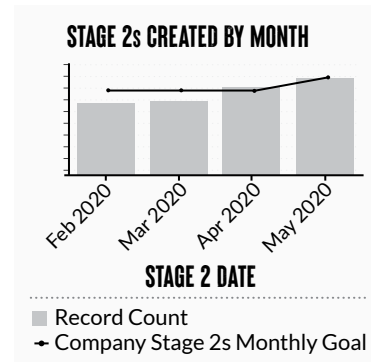
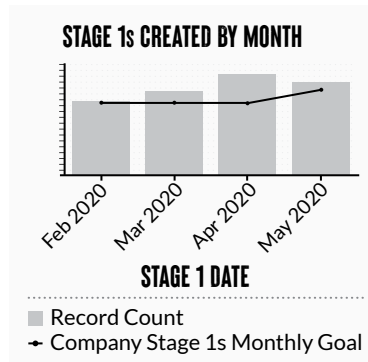
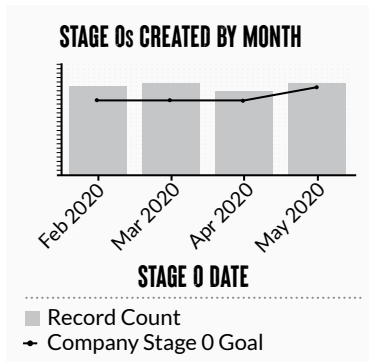
### CHAPTER SUMMARY

With a solid strategic and technology foundation in place, it's time to put this bold new vision into action. Latané takes you behind the scenes and delivers real-world examples that show exactly how she and her team create a comprehensive plan to build, understand, and align on a revenue operating model; address areas that need improvement; design the right Go-to-Market plan; execute account-based campaigns; and build trust through relentless transparency and communication.

### KEY TAKEAWAYS

- In order to achieve predictable revenue growth, we must define our revenue operating model. We then must align on it to ensure the entire revenue team is focused on a common goal and understands the underlying dependencies of how to achieve it.
- No team has unlimited capacity, so it's important to develop a structured Go-to-Market plan that can account for the number and complexity of campaigns you implement and the size, skills, and resources of your team.
- The right tech will do a lot of the account-based execution heavy lifting, but not all of it. You and your team will need to define the key elements of any campaign, including your business objective, budget, content and creative, and the prospect experience you want to deliver.
- Success with a segment-focused, account-based approach requires the ability to measure campaigns at a granular level, adopting an “inspect what you expect” mentality, analyzing each campaign against its goals, seeing where it performed and where it didn't, and adjusting accordingly.

## STAGE 0s, 1s, 2s



# KNOWLEDGE-BUILDING PRACTICE & EXERCISES

- List the 6 steps of the repeatable process for creating truly customer-first, account-based, insights-driven sales and marketing programs.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## STEP 1: ALIGN ON A REVENUE OPERATING MODEL

- At a high level, a revenue operating model is a framework for how you're going to:

- |   |   |
|---|---|
| <input type="radio"/> Determine your pipeline | <input type="radio"/> Make the shift to account-based |
| <input type="radio"/> Make money              | <input type="radio"/> Inform your technology choices  |

- The reason it's important to dial in on a revenue operating model – and to align on it across the revenue side of the organization – is that:

- |  |   |
|--|---|
| <input type="radio"/> It makes sure sales leadership doesn't change the plan midway through the year without keeping everyone on the same page | <input type="radio"/> It makes sure you're all focused on a common goal and you all understand the underlying dependencies of how to get there                      |
| <input type="radio"/> It makes sure marketing doesn't get credit for underperforming MQLs that don't turn into opportunities                   | <input type="radio"/> It ensures that both marketing and sales take full advantage of the technology investments that have been made to operationalize the business |

## THE NUTS AND BOLTS OF CREATING A REVENUE OPERATING MODEL

4. Before building out your revenue operating model, you need to look at historical data to determine some key metrics, including your average transaction cycle time, win rate, deal size, and the amount of pipeline you create at each stage in the marketing funnel. Determining how the averages are calculated depends on the types of deals you do.

For transactional-type deals, a historical \_\_\_\_\_ average is recommended.

For long-cycle deals, it's recommended that you look at your data for the past \_\_\_\_\_.

5. To ensure your marketing strategy allows you to hit your revenue goals, it is important to identify the specific marketing channels you'll use. **List four examples:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_



**TIP:** Check out **page 100** for a visual example of the 6sense account-based funnel showing how accounts move through the buying stages and into sales opportunity stages.

Below is an example of how to use your revenue operating plan to determine quotas.

## MANAGEMENT SYSTEM & PIPELINE QUOTAS

		Target			
Created Month	Impact Month	\$2 Pipe	# of 0s	# of 1s	# of 2s
Jan-20	Mar-20	\$5,217,962	159	124	71
Feb-20	Apr-20	\$6,156,773	187	146	83
Mar-20	May-20	\$6,156,773	187	146	83
Apr-20	Jun-20	\$6,156,773	187	146	83
May-20	Jul-20	\$7,274,669	221	172	98
Jun-20	Aug-20	\$7,274,669	221	172	98
Jul-20	Sep-20	\$7,274,669	221	172	98
Aug-20	Oct-20	\$8,168,986	248	194	110
Sep-20	Nov-20	\$8,168,986	248	194	110
Oct-20	Dec-20	\$8,168,986	248	194	110
Nov-20	Jan-21	\$8,898,678	270	211	120
Dec-20	Feb-21	\$8,898,678	270	211	120
		<b>\$87,816,599</b>	<b>2669</b>	<b>2082</b>	<b>1187</b>

Stage 0 to 1 Conversion	78%
Stage 1 to 2 Conversion	57%
Stage 2 to Won Conversion	30%
Deal Cycle Stage 0 to 7 Days	87
Average Selling Price	\$74,000

	% Sourced	Marketing %
Inbound	24%	30%
Outbound	24%	30%
Events	32%	40%
Non-Marketing	20%	n/a
	<b>100%</b>	<b>100%</b>

6. Starting with your conversion rates for each stage, average deal cycle, and average sale price, and knowing the percentages coming from each channel, complete the following to add monthly quotas for each opportunity stage.

Stage 0 to 1 Conversion	75%
Stage 1 to 2 Conversion	55%
Stage 2 to Won Conversion	25%
Deal Cycle Stage 0 to 7 Days	45
Average Selling Price	\$50,000

	% Sourced	Marketing %
Inbound	25%	40%
Outbound	25%	30%
Events	30%	30%
Non-Marketing	20%	n/a
	100%	100%

		Target			
Created Month	Impact Month	S2 Pipe	# of Stage 0s	# of Stage 1s	# of Stage 2s
January		\$4,000,000			
February		\$4,150,000			
March		\$4,150,000			
April		\$4,625,000			
May		\$5,000,000			
June		\$5,000,000			
July		\$5,200,000			
August		\$5,200,000			
September		\$5,800,000			
October		\$6,400,000			
November		\$6,400,000			
December		\$6,800,000			
	TOTALS				

7. True/False (circle the correct answer)

Depending on your organization size and structure, you may need to have more than one revenue operating model.

## STEP 2: FIND THE RED

8. "Finding the red" means:

- Finding any areas in the plan where numbers are in the "red" (negative)
- Looking for spots in the plan that either aren't performing or are at risk of falling short
- Uncovering and eliminating marketing programs without a 30%+ ROI
- Interviewing revenue model stakeholders to understand what's frustrating them

9. Which of these statements is correct?

- Marketing can and should have an impact at all stages of the revenue operating model.
- Marketing must focus on pre-pipeline and leave the opportunity stages to sales, otherwise there is redundancy and inefficiency in the model.

It's important to find the red in your revenue operating model. Benchmarks can be a great place to start. Insight Partners and Gartner/TOPO are great resources, but the best benchmark is yourself. Below is an example of all the places in an account-based funnel to find holes, gaps, leaks, or areas to improve.

## FROM → TO GOOD PLACES TO "FIND RED"

AWARENESS & CONSIDERATION	6QA	ICP Web traffic, ICP Engagement, VTR, SOV, AR Mentions, Accounts Reached, CTAs, Segmentation, Creative, Content, Keywords, Predictive Model Metrics
6QA	MEETING	ICP Engagement, Conversion Rate & Velocity Stage 0, 1s, Cadences, CTAs, SLAs, Web/Content Experience, 6QAs Worked, Bot Conversations
MEETING	PIPELINE	Conversion Rate & Velocity, 1,2, Aging Reports (stuck stage 1s), Gong Calls, Nurture Cadences, Worked Opps Accounts, Web/Content Experience
PIPELINE	CLOSED / WON	Win Rate Compete & Non Compete, Cycle Time, ACV, Engagement Trend, Persona Map, Aging Reports (stuck stage 2s), Gong Calls, Product Demo, Sales Materials, Win/Loss Calls, Competitive Intel
CLOSED / WON	ADOPT & GROW	Net & Gross Retention, Time to Go Live, Usage, Adoption By Use Case, Personas Engaged, Relationship Map, Value Metrics, NPS

### EXERCISE: COMPLETE THE TABLE BELOW FOR YOUR ORGANIZATION.

FROM	TO	GOOD PLACES TO "FIND RED"
Top of the Funnel	Opportunity	
Opportunity	Meeting	
Meeting	Pipeline	
Pipeline	Closed/Won	
Closed/Won	Adopt & Grow	

For each "FROM/TO" listed above, ask yourself, "What can we do to improve this specific metric/goal?"

FROM/TO: \_\_\_\_\_ What we can do to improve: \_\_\_\_\_

FROM/TO: \_\_\_\_\_ What we can do to improve: \_\_\_\_\_

FROM/TO: \_\_\_\_\_ What we can do to improve: \_\_\_\_\_

FROM/TO: \_\_\_\_\_ What we can do to improve: \_\_\_\_\_

FROM/TO: \_\_\_\_\_ What we can do to improve: \_\_\_\_\_

FROM/TO: \_\_\_\_\_ What we can do to improve: \_\_\_\_\_

10. Winning by Design challenges sales and marketing leaders to answer the question, “How can you double your revenue?” The obvious answer is to:
- Double your number of leads                       Improve the prospect and customer experience

## DIGGING INTO CONVERSION RATES

11. According to Chris Codelli, the director of sales and marketing at Marlin Operations Group, Inc., there are four factors that companies can impact to grow sales productivity. **List them below:**
1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_
  4. \_\_\_\_\_

## STEP 3: DESIGN YOUR GO-TO-MARKET (GTM) PLAN

12. Your GTM plan spells out the specific campaigns you’re going to run to achieve the revenue operating model you’ve established. You can think of your GTM plan as:
- A way to ensure you’re allocating the right resources to your biggest ideas
- Your capacity plan – it ensures you have the coverage needed to meet your goals
- A proxy for your revenue operating model
- A content production map/gap analysis tool
13. One way to ensure you have the resources and capacity to execute your GTM plan is to tier your efforts, with the first tier being most resource-intensive, the second tier being less so, and the third tier more or less operating in the background once it’s up and running. For each campaign tier, list what your team should understand:

### Tier 1 Campaigns

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

### Tier 2 Campaigns

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Tier 3 Campaigns**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

14. What two things must every campaign have?

- A budget and a target ROI
- An owner and a publicly available metrics dashboard
- A digital component and real-time performance tracking
- A business objective and a tie to an account segment

15. Creating a solid GTM plan with a tiered system is a great way to understand your capacity down to the exact number of campaigns per tier your team (and budget) can handle. It also ensures you're only saying yes to the absolute best campaigns that will help you meet your objectives.

A solid GTM plan eliminates: \_\_\_\_\_.



**TIP:** Check out the strawman GTM plan on **page 111** for inspiration.

Create your own sample GTM plan. List one Tier 1 initiative and the corresponding Tier 2 and Tier 3 programs.

SAMPLE GTM PLAN	
TIER 1	
TIER 2	
TIER 3	

# STEP 4: EXECUTE USING THE 5-STEP ACCOUNT-BASED FORMULA

Let's review the 5-step ABM flow:

1. Select the best accounts
2. Know about them
3. Engage the right way
4. Collaborate with sales
5. Track real stuff

16. Having the right tech in place will do a lot of the heavy lifting, but it won't do everything. You and your team will need to define the following key elements of any campaign:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

Let's take a look at the five ABM steps and drill down to see which parts require humans and which can be left to the tech stack.

## 1. Select the best accounts

You	Your Tech Stack
Define the business objective (e.g., enter a new geo or industry, introduce a new product, take market share from a competitor)	Collect and analyze buyer intent and activity data to identify the best accounts for your goal
	Score activity against your ICP
	Continually learn what behaviors are leading to new opportunities
	Provide insights into the account's buying stage
	Surface who is on the buying team and what they care about

## 2. Know about them

You	Your Tech Stack
Identify the data and insights you need, and determine how you'll use those insights to engage with prospects.	Provide rich insights about the accounts
	Capture prospect buying signals from the CRM and marketing automation systems
	Ingest search data and research activity from across the B2B web
	Structure, clean, and organize intent data and insights for use

### 3. Engage the right way

You	Your Tech Stack
Determine the content, creative, budget, and prospect experience	Identify the right person to receive your message
	Deliver the message on the right channel
	Deliver the message at the right time
	Use AI orchestration to intelligently automate every campaign

### 4. Collaborate with sales

You	Your Tech Stack
Get sales and marketing on the same page by knowing which accounts are showing meaningful activity, where they are in their buying journey, and what efforts are working to get them moving through the funnel	Automatically alert sales reps when accounts are ready to be worked, or have a change in status
	Provide a common set of metrics for the entire revenue team
	Deliver AI-driven next-best actions and tactics

### 5. Track real stuff

You	Your Tech Stack
Eliminate finger pointing and unite the revenue team	Track budget and ROI in real time
	Deliver account-based metrics like accounts reached, personas engaged
	Track in-market accounts
	Surface advanced metrics like account engagement level or best tactics by segment



**TIP:** For more on how the 5-step approach works in the real world, review the Tier 1, 2 and 3 campaigns detailed on **pages 114-125**.

## THE PLAN IN ACTION: NO FORMS, NO SPAM, NO COLD CALLS

17. If you haven't already, review the real campaign examples provided on **pages 114-125** of your book. What three things were conspicuously absent from each of these campaigns?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

18. Following the tiered approach and 5-step ABM process can help you create amazing experiences. In the table below, label each campaign type as Tier 1, Tier 2, or Tier 3.

Tier?	Campaign
_____	Increase ROI from an event series
_____	Territory warm up
_____	New product introduction
_____	New customer welcome program
_____	Deal blitz
_____	Deal acceleration program
_____	Funding announcement
_____	Competitive takeout
_____	New research report
_____	Content syndication

## STEP 5: INSPECT WHAT YOU EXPECT

The idea behind “inspect what you expect” isn't about measuring for the sake of measuring. Instead, it's about inspecting each campaign against the goals we define, analyzing performance, and adjusting accordingly.

What you expect	What you inspect
Accounts reached: To hit a critical mass of target accounts	Your segment and bidding strategy to ensure you're reaching enough of the right accounts
View-through rate: To ensure sufficient interest to drive traffic to the website	Your creative and messaging to ensure your message is resonating with your audience
Account engagement: To understand how to move the account forward in the buying journey	Your digital experience to ensure it's personalized to what accounts care about
Meetings booked: To make sure you have a compelling call-to-action	Your digital marketing and sales motion to ensure you're not creating undue friction for prospects
Pipeline created: To ensure your campaign is driving expected results	Your BDR outreach, number of channels, and persona engagement to ensure accounts are moving through the buying journey

## STEP 6: COMMUNICATE AND REPEAT

19. Full transparency means we're all aware of where we're \_\_\_\_\_, and where we're \_\_\_\_\_.
- Going/coming from
  - Focused today/headed tomorrow
  - Getting our current business/trying to grow
  - Smashing expectations/struggling
20. Communication is key, but so is having the right technology to deliver valuable insights. Two significant elements that can go a long way toward driving critical alignment across the revenue team are (select the correct two):
- Trust in your data
  - A system of "truth"
  - Strong sales leadership
  - Account-based metrics
  - Good reporting
  - A data enrichment provider



**TIP:** If you need some inspiration, check out the Impartner case study on **pages 134-135**. They've fully embraced orchestrated account engagement and are crushing the prospect experience in ways that will get you fired up.

# CHAPTER 4

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## TERMINOLOGY

Draw a line to match the term with its definition.

- |                           |   |
|---------------------------|---|
| Revenue Operating Model ● | ● The percentage of final stage prospects that become customers divided by the total number of deals in the pipeline.   |
| Finding the Red ●         | ● High impact campaigns designed to further your big ideas that require significant coordination across the whole organization, branding, social campaigns, and company enablement. |
| Average Selling Price ●   | ● Time-bound campaigns geared toward increasing pipeline or engagement, targeting a focused account segment.  |
| Win Rate ●                | ● “Always on” campaigns run programmatically with minimal effort, designed to build and accelerate pipeline.  |
| Sales Cycle Length ●      | ● A subset of ICP accounts, grouped by demographic, technographic, and firmographic data used to target accounts with relevant, personalized outreach.                              |
| GTM Plan ●                | ● A living, breathing framework and plan for how the company is going to make money.  |
| Tier 1 Campaign ●         | ● The average price at which a particular product or service is sold across channels or markets.  |
| Tier 2 Campaign ●         | ● Amount of time between the first touch with a prospect and the closing of the deal.   |
| Tier 3 Campaign ●         | ● A plan that spells out the specific campaigns needed to achieve the revenue operating model you’ve established.   |
| Account Segment ●         | ● The process of looking for spots in the revenue operating plan that either aren’t performing or are at risk of falling short.   |

# CHAPTER 4

## ANSWER KEY

1. Align on a revenue operating model; Find the red, Design your Go-to-Market plan; Execute using the 5-step account-based formula; Inspect what you expect; Communicate & repeat
2. Make money
3. It makes sure we're all focused on a common goal and we all understand the underlying dependencies of how to get there
4. Three-months; 12 or even 18 months
5. Inbound; Outbound; Events; Digital
- 6.

Created Month	Impact Month	Target			
		S2 Pipe	# of Stage 0s	# of Stage 1s	# of Stage 2s
January	March	\$4,000,000	193	145	80
February	April	\$4,150,000	200	150	83
March	May	\$4,150,000	200	150	83
April	June	\$4,625,000	225	169	93
May	July	\$5,000,000	241	181	100
June	August	\$5,000,000	241	181	100
July	September	\$5,200,000	252	189	104
August	October	\$5,200,000	252	189	104
September	November	\$5,800,000	280	210	116
October	December	\$6,400,000	311	233	128
November	January	\$6,400,000	311	233	128
December	February	\$6,800,000	329	247	136
TOTALS		\$62,725,000	3,035	2,277	1,255

7. True
8. Looking for spots in the plan that either aren't performing or are at risk of falling short
9. Marketing can and should have an impact at all stages of the revenue operating model
10. Improve the prospect and customer experience
11. Increase number of new opportunities; Increase average selling price; Increase win rate; Decrease sales cycle length
12. Your capacity plan – it ensures you have the coverage needed to meet your goals
13. Tier 1: They require significant coordination across the whole organization; They should have their own branding, social campaigns, and company enablement; They're about more than just a pipeline goal – they are designed to further your big ideas and your company leadership; An advanced team can pull off one per quarter, max. Tier 2: They're time-bound based on season, a show, market news, etc.; They are focused – maybe on a persona, install base, geo, etc.; They tie to a micro-segment or a sub-segment – they're not run against your entire ICP, but rather a subset of select accounts; They support larger themes and branding; They typically tie to an account engagement and pipeline goal. Tier 3: They are ongoing for six months or more, but they're refreshed quarterly; They provide programmatic, "always on" air cover; They tie to master segments (e.g., ICP, customer, open opportunities)
14. A business objective and a tie to an account segment
15. Random acts of marketing
16. Your business objective; Your budget; Your content and creative; Your prospect experience
17. Forms; Spam; Cold calls

18. Tier 2; Tier 2; Tier 1; Tier 3; Tier 2; Tier 3; Tier 1; Tier 2; Tier 1; Tier 3

19. Smashing expectations/Struggling

20. Trust in your data; Good reporting

### **Revenue Operating Model**

A living, breathing framework and plan for how the company is going to make money.

### **Finding the Red**

The process of looking for spots in the revenue operating plan that either aren't performing or are at risk of falling short.

### **Average Selling Price**

The average price at which a particular product or service is sold across channels or markets.

### **Win Rate**

The percentage of final stage prospects that become customers divided by the total number of deals in the pipeline.

### **Sales Cycle Length**

Amount of time between the first touch with a prospect and the closing of the deal.

### **GTM Plan**

A plan that spells out the specific campaigns needed to achieve the revenue operating model you've established.

### **Tier 1 Campaign**

High impact campaigns designed to further your big ideas that require significant coordination across the whole organization, branding, social campaigns, and company enablement.

### **Tier 2 Campaign**

Time-bound campaigns geared toward increasing pipeline or engagement, targeting a focused account segment.

### **Tier 3 Campaign**

"Always on" campaigns run programmatically with minimal effort, designed to build and accelerate pipeline.

### **Account Segment**

A subset of ICP accounts, grouped by demographic, technographic, and firmographic data used to target accounts with relevant, personalized outreach.

# CHAPTER 4

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## DOWNLOADABLE TEMPLATES & RESOURCES



### FORMS

- Revenue Model Worksheet
- GTM Planning Worksheet



### VIDEOS

- MakingSense of Lead Generation
- Selling with Intent: Sales Enablement - MX Bryce Nobles
- Selling with Intent: Journey With Sales - Aprimo



### EBOOKS / ARTICLES

- eBook: The Science of B2B Selling: How Modern Sales Teams Win Deals Now

## NOTES

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# CHAPTER 5

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## THE MODERN SALES ORGANIZATION

### CHAPTER SUMMARY

Selling is vastly different than it was even a few years ago. Old-school selling tactics are no longer effective, which causes sellers to waste tons of time on busywork, chase the wrong prospects, miss the mark on messaging, and get into deals too late to be successful. In this chapter, Latané hands the mic to 6sense CRO Mark Ebert, who takes us on a deep dive into modern selling principles and how to put them into practice to lead effective, productive, and happy sales teams.

### KEY TAKEAWAYS

- Buyers conduct nearly 70% of their research online, anonymously, but they leave behind a digital breadcrumb trail in the Dark Funnel™ as they do it. If sellers can peek into the Dark Funnel™, they can understand essential information about buyers to sell more effectively and efficiently.
- Sellers' most valuable resource (some would argue only resource) is their time. Effective, data-driven prioritization can make the difference between spinning wheels and beating quota quarter after quarter.
- Knowing what stage of the buying journey prospective buyers are in helps sellers predict upcoming needs.
- Having a proven demand signal optimizes the entire revenue system.
- Ensuring multithreading at every stage of the selling process – and removing the barriers to contact – makes an account much more likely to close.
- Understanding the importance of in-market accounts changes how the entire revenue operations team orients to opportunity.

- AI and big data give companies confidence, agility, and the solid insights necessary to make major decisions about whether to expand and target areas to focus on.
- A unified pipeline model depends on AI for accurate projections to determine bookings target and rolling goals.
- Attracting and retaining new hires depends on data-driven decisions, fostering a culture of growth, and offering the right kinds of enablement.
- Judiciously used, spiffs can help you address specific gaps, encourage team-building, and ensure engagement.
- The most significant change that comes from this modern sales philosophy is establishing true, trusted alignment between sales and marketing.

# KNOWLEDGE-BUILDING PRACTICE & EXERCISES

## LIGHTING UP THE DARK FUNNEL™

1. Buyers now conduct most of their research online (nearly 70%, according to Forrester), and they do so \_\_\_\_\_. Only \_\_\_\_\_% of all B2B website visits result in a form fill.
2. Some of the insights that exist in the Dark Funnel™ include (**select all that apply**)
  - The duration of an organization's buyer journey
  - Individuals' salary history
  - The size of the buying team
  - The sources where those team members get their information
  - The financial situation their company might be in, which informs their ability or need to purchase new solutions
  - The technological condition they're in, which tells you if their tech stack is compatible with your solution
  - Personal history of a company's founders
  - Hiring activity and market updates
3. **True/False (circle the correct answer)**

If a potential customer just made a purchase that's in the same ecosystem your product is in, you should wait a few weeks before engaging.
4. Label the behavior with whether it describes external (E) or internal (I) dark funnel activity.
  - \_\_\_ Buying committee members that are engaging but not yet MQLs
  - \_\_\_ Accounts purchasing tangential solutions
  - \_\_\_ Accounts that are showing intense interest on your website
  - \_\_\_ Accounts comparing competitor solutions to yours
  - \_\_\_ Sales rep interactions (not normally entered into CRM)
  - \_\_\_ Accounts researching keywords relevant to your category or solution

# PUTTING REPS IN A POSITION TO WIN

5. True/False (circle the correct answer)

The most impactful way to decide which accounts to target is based on logos and hunches.

6. What does an account need to qualify as 6QA (6sense qualified account)? (select all that apply)

- A similarity to your ideal customer profile (ICP)
- A sexy logo
- Signals of being in the awareness or consideration stage
- Signals of being in the decision or purchase stage
- Relevant quality, quantity, recency, and diversity of outreach activities on a given account

7. The 6QA is not a magic bullet, but it gives our reps a simple and trustworthy way to \_\_\_\_\_  
\_\_\_\_\_.

# WHAT ABOUT THOSE EARLY-STAGE ACCOUNTS?

8. Under some circumstances, such as \_\_\_\_\_, sales might need to work an account before it's in the purchase and decision stage.

9. How does marketing engage a not-yet-ready account? (select all that apply)

- Advertising
- Content syndication
- Direct mail
- Fillable forms
- Events
- Cold calls
- Email

# ACCOUNTS > LEADS

10. Research shows that a single person showing interest converts into meaningful activity \_\_\_\_\_  
\_\_\_\_\_ % of the time.

11. True/False (circle the correct answer)

The longer the opportunity goes on, the easier it is to engage and set meetings with multiple contacts.

12. One way to make it easy for sellers to multithread is to \_\_\_\_\_  
\_\_\_\_\_.

13. Tech can peek into the Dark Funnel™ to see an account's research activities and weigh their significance based on \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_, then send the signal when it's time to prioritize outreach on that account.
14. A measure of how important a persona is for closing deals and whether contacts that align to these personas exist in CRM or MAP is called a \_\_\_\_\_. A measure of how engaged a contact is with your brand based on a comparison to previously won opportunities is called a \_\_\_\_\_.

## PRIORITIZATION IN ACTION

15. List three ways a seller can reach out to an account that's in market.
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_
16. Explain, why, in your own words, having fewer accounts to work can generate more revenue.
17. 6sense did an analysis and found that within just two quarters of using the prioritization approach outlined in the book, customers were putting 56% of their effort toward \_\_\_\_\_, and those accounts were driving 79% of their \_\_\_\_\_.
18. **Who said it?**

“77% of opportunities created are ones that 6sense identified as being in decision and purchase stages. The concept of ‘in-market’ accounts has permeated not only the sales team, but the entire revenue operations team.”

\_\_\_\_\_

## OLD-SCHOOL VS. NEW-SCHOOL TERRITORY DESIGN

19. Traditionally, territories have been \_\_\_\_\_ lists of accounts that salespeople work all year long.
20. **True/False (circle the correct answer)**

Data-driven, dynamic territories are too labor intensive to be feasible.

21. Revenue technology tools allow sales leaders to **(choose all that apply)**

- Tailor territories to their company's specific situation and refine them in a way that makes sense for each segment
- Narrow the number of accounts a rep is expected to work, so they can dedicate their full attention to the ones that are likely to convert
- Increase chances to create opportunities from ice-cold accounts
- Help reps prioritize accounts that are going to turn into pipeline
- Have infinitely flexible and relatively effortless ways to create territories

## GETTING INTO NEW MARKETS + VERTICALS

22. Without modern tech to support expansions into new markets and verticals, describe two typical scenarios likely to play out.

1. \_\_\_\_\_
2. \_\_\_\_\_

23. An AI platform helps clients make big decisions on expansion with **(choose all that apply)**

- Data-based insights
- Predictive testing
- Current results in real-time
- Lists of in-market accounts
- Quick turnaround
- Manual, time-consuming analysis

## THE UNIFIED PIPELINE MODEL

24. True/False (circle the correct answer)

\_\_\_\_\_  True  False  
MQLs are the best way to measure marketing's contributions to pipeline.

25. A key to getting marketing and sales on the same page is for both teams to look at the same \_\_\_\_\_ and calculate them in the same way.

26. At what stage in a unified pipeline approach should marketing and sales be on the same page?

\_\_\_\_\_

27. When you forecast pipeline with AI it solves for two problems that previously plagued revenue teams: Determining the best goals and generating an accurate projection of end-of-quarter revenue. AI provides **(choose all that apply)**
- A rolling, accurate goal to meet a bookings target
  - The ability to look back at historical patterns to see underlying performance and project end of the quarter status
  - Visibility into critical pipeline issues
  - Identification of the specific go-to-market segments that need the most attention
  - Assessment of whether the pipeline is sales-sourced or marketing-sourced
28. **True/False (circle the correct answer)**
- “Finding the red” is only useful in finding ways to improve pipeline in later funnel stages.
29. **Who said it?**
- “Candor matters. Execution along with that candor matters more. It’s not about finding everything that’s working. It’s tracking, metricking, and being in that game together. You’ve gotta create harmony between the two organizations.”
- 

## HIRING, RETENTION + ENABLEMENT

30. What attracts and retains new hires? (choose all that apply)
- The technology, tools, and support they need to prioritize their time
  - Getting ramped up and winning faster than in other companies
  - Hitting and exceeding quotas
  - Likelihood of getting an invitation to President’s Club
  - Data-driven decisions that make reps successful
  - Occasional training
  - Effective enablement
31. A spiff is: **(circle the correct answer)**
- a. someone with style
  - b. a Sales Program Incentive Fund
32. Some CROs avoid spiffs because they believe they \_\_\_\_\_ the wrong things.

33. List five pointers for optimizing a return on your spiff

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_
- e. \_\_\_\_\_

## ALIGNMENT ACROSS THE REVENUE TEAM

34. The keys to a successful revenue team at a high-growth company are **(choose all that apply)**

- Alignment on total addressable market
- Agreement on ideal customer profile
- Educated guesswork
- Common set of metrics such as conversion rates, deal size, overall qualified pipeline, win rates, and revenue.
- Monthly spiffs
- Collaboration between marketing and sales for go-to-market motions, segmentation, account prioritization and nurturing, and pipeline planning

35. When working on pipeline targets, don't be concerned about whether pipeline is sales-sourced or marketing-sourced. What matters is \_\_\_\_\_ and how they are \_\_\_\_\_.

36. What are some steps a company can take to align their revenue teams?

- Hold monthly all-revenue team calls
- Ensure that in sales meetings, the ABX team is aligned with an RVP
- Work together on pipeline targets
- Create and track whatever metrics make sense for your individual teams
- Share data across sales and marketing to create an ABX to engage high stake prospects

37. Accountability means: **(circle the correct answer)**

- a. Sharing the responsibility for hitting numbers across the entire revenue team or
- b. Holding oneself as AE, manager, or CRO responsible for realizing goals

# CHAPTER 5

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## TERMINOLOGY

Draw a line to match the term with its definition.

- Tiger team ●
- Multithreading ●
- Unified pipeline model ●
- Sales Program Incentive Funds ●
- Contact fit grade ●
- Contact engagement grade ●
- Enablement ●

- Affectionately known as spiffs, they are a way to rally a team or individual to amp up efforts to achieve a goal with the help of some healthy competition.
- Regular, hands-on training that gets super-granular about what to do and how to do it in different scenarios.
- A measure of how engaged a contact is with your brand based on a comparison to previously won opportunities. This model goes beyond arbitrary lead scoring and uses big data to understand which of our contacts we've gotten to engage with us at a level that would predict success. Each known contact is given an engagement grade of A, B, C, or D.
- A hand-picked team of top reps who have proven a willingness to try new things in pursuit of success.
- A measure of how important a persona is for closing deals and whether contacts that align to these personas exist in CRM or MAP. Uncover gaps in the buying team and acquire them when needed to accelerate deals. Contact personas are given a grade of strong, moderate, or weak profile fit.
- A pipeline model based on true co-ownership between marketing and sales and a shared understanding of the underlying revenue assumptions.
- Connecting with multiple personas across the buying team from the start of engagement.

# CHAPTER 5

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## ANSWER KEY

1. Anonymously. 2%-5%
2. Does not apply: Individuals' salary history, Personal history of a company's founders.
3. False
4. (I) Buying committee members that are engaging but not yet MQLs  
(E) Accounts purchasing tangential solutions  
(I) Accounts that are showing intense interest on your website  
(E) Accounts comparing competitor solutions to yours  
(I) Sales rep interactions (not normally entered into CRM)  
(E) Accounts researching keywords relevant to your category or solution
5. False
6. Does not apply: A sexy logo
7. Prioritize their time
8. In companies with a narrow ICP
9. Not apply: fillable forms and cold calls
10. Less than 1% of the time.
11. False
12. make it easy to get quality contact data
13. persona, recency, and frequency
14. Contact fit grade/contact engagement grade
15. LinkedIn messenger, Drift videos, LinkedIn voicemails, email Cadences, phone calls
16. Fewer accounts means highly personalized, multichannel, multi-persona outreach.
17. in-market accounts/revenue
18. Casey Carey, CMO Kazoo
19. Static
20. False
21. Does not apply: Increase chances to create opportunities from ice-cold accounts.
22. analysis paralysis, wasted money and time spent on consulting firms
23. Does not apply: Manual, time-consuming analysis
24. False
25. Metrics
26. From the very beginning
27. Does not apply: Assessment of whether the pipeline is sales-sourced or marketing-sourced
28. False
29. Steve Fitz, CRO of Sumo Logic
30. Does not apply: Occasional training
31. Sales Program Incentive Funds
32. They incentivize the wrong things.
33. Get clear on your goals; Decide on whether a team or individual spiff is better for your goals; Offer an incentive people will get excited by, such as an extravagant experience or cash; Keep the spiff short and sweet; Designate a cheerleader; Foster a team mentality; Ensure engagement; Encourage in-market conversion; Keep spiff top of mind
34. Does not apply: Educated guesswork and monthly spiffs
35. assumptions and how they are trending
36. Does not apply: Create and track whatever metrics make sense for your individual teams
37. b is correct

**Tiger team**

A hand-picked team of top reps who have proven a willingness to try new things in pursuit of success.

**Multithreading**

Connecting with multiple personas across the buying team from the start of engagement.

**Unified pipeline model**

A pipeline model based on true co-ownership between marketing and sales and a shared understanding of the underlying revenue assumptions.

**Sales Program Incentive Funds**

Affectionately known as spiffs, they are a way to rally a team or individual to amp up efforts to achieve a goal with the help of some healthy competition.

**Contact fit grade**

A measure of how important a persona is for closing deals and whether contacts that align to these personas exist in CRM or MAP. Uncover gaps in the buying team and acquire them when needed to accelerate deals. Contact personas are given a grade of strong, moderate, or weak profile fit.

**Contact engagement grade**

A measure of how engaged a contact is with your brand based on a comparison to previously won opportunities. This model goes beyond arbitrary lead scoring and uses big data to understand which of our contacts we've gotten to engage with us at a level that would predict success. Each known contact is given an engagement grade of A, B, C, or D.

**Enablement**

Regular, hands-on training that gets super-granular about what to do and how to do it in different scenarios.



# CHAPTER 6

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## ARE YOU READY TO BREAK THROUGH?

### CHAPTER SUMMARY

We all have reasons (some might say excuses) for why we're not able to make big changes. The reality is change isn't really a choice: Like it or not, the old ways of selling and marketing are gone. Latané lays out what it takes to transform each role within sales and marketing (Revenue Ops, Digital Marketing, Demand Gen, Field Marketing, BDRs/SDRs/MDRs, Sales Leaders, and Account Executives) to become difference-makers for your organization and inspire "mobilizers" to advocate for change. If doubling your numbers with an industry-leading customer acquisition cost feels like a pipe dream now, you'll have an entirely new outlook on what's possible after reading this chapter. With a bold vision, the right technology, a comprehensive plan, and a team of difference-makers, your breakthrough awaits.

### KEY TAKEAWAYS

- As a profession, sales and marketing has been slow to evolve in order to meet the challenges and expectations of today's B2B buyers, continuing to rely on different data, platforms, and metrics. This limits their ability to coordinate engagement with the right accounts throughout the customer journey.
- Organizations continue to rely on MQLs and SQLs — including nearly 60 percent of account-driven organizations — despite the fact that half don't believe their lead scoring processes surface the best leads accurately or consistently.
- To make the shift, organizations need people who get on the field, take risks, and have the courage to argue for what must change. These are your "difference-makers" and you need to seek them out from across the revenue team.
- *No Forms, No Spam, No Cold Calls* is aspirational, not something we can succeed with immediately at 100 percent. It's a reminder for us to look inward, check ourselves, and shock our systems into doing better. But it's also about having fun and bringing passion, energy, creativity, and outside the box thinking back into revenue operations.

# KNOWLEDGE-BUILDING PRACTICE & EXERCISES

1. Change isn't just coming, it's here. The old ways of selling and marketing are fading, and a new reality is forming. As we undergo this transformation, difference-makers will emerge across organizations to lead the change. These are the people who take real risks to advocate for the changes they see as necessary. Which six traits below belong to difference-makers?

- Grit and tenacity
- Good organizational skills
- Strong work ethic
- Not afraid to provoke for the greater good
- Great communication skills
- Curiosity
- Culture warrior mentality
- Discomfort with the status quo
- Non-confrontational nature
- Not clock-punchers

## REVENUE OPERATIONS ENABLES BREAKTHROUGHS THROUGHOUT THE ORGANIZATION

2. Revenue operations (RevOps) is the keeper of the:

- Revenue goals
- Virtuous Cycle
- Capacity plan
- V2MOM

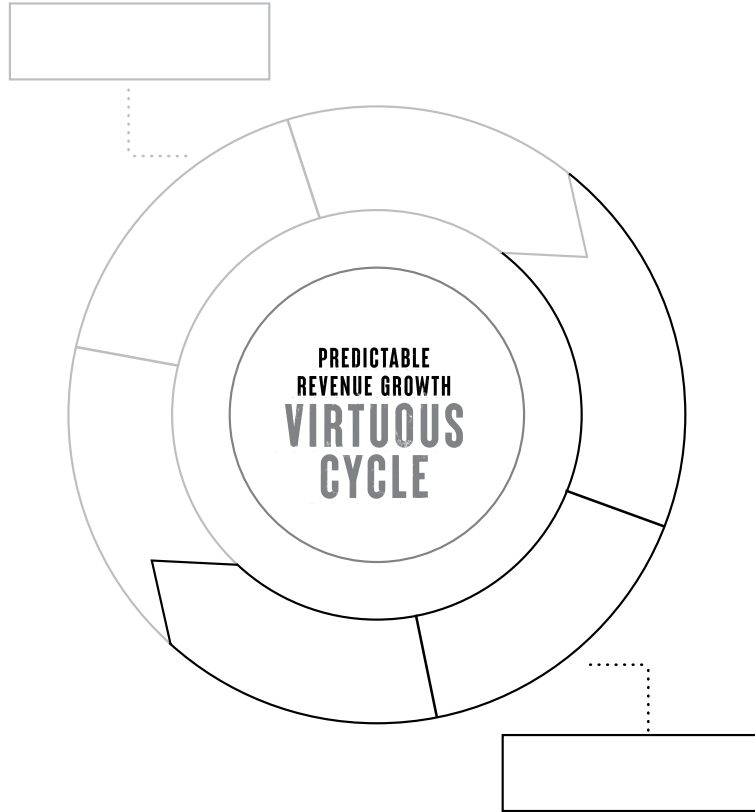
3. Whether it functions as its own official department within an organization or more loosely as a meeting-of-the-minds between sales, marketing, and customer success, the goal for RevOps is the same:

\_\_\_\_\_.

4. RevOps drives — and benefits from — the Virtuous Cycle. Studies have shown that profit and growth are predicated on having satisfied, loyal, and, ultimately, amplified customers. A better customer experience improves:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

5. Label the diagram below.



6. RevOps difference-makers create an environment in which people can have \_\_\_\_\_ to data. It's this direct access, without a \_\_\_\_\_, that allows for real breakthroughs.
7. With the right tools, insights, and skills, RevOps can enable teams throughout the organization to provide amazing customer experience and break through to their full potential. Today's RevOps difference-makers can do so much more, because they know so much more. **Complete the table below.**

Modern RevOps Can:	Because They Know:
Provide revenue teams with powerful insights that create a competitive advantage	a)
Drive operational and cost efficiencies throughout the customer lifecycle	b)
Deliver a more predictable revenue operating plan	c)
Set every seller up for success	d)
Put customer and future customer experience front and center	e)
Confidently enable teams and drive adoption of the modern account engagement stack	f)

# DIGITAL MARKETERS TRANSFORM THE DIGITAL EXPERIENCE

8. True/False (circle the correct answer)

Sales teams no longer create demand; it is created by prospects in ICP accounts conducting research long before they engage with a salesperson.

9. Digital marketers must uncover demand and turn it into opportunities. (Remember the Dark Funnel™?) Uncovering this demand — and lighting up your Dark Funnel™ — takes more than just driving loads of clicks. It requires a deep understanding of brand positioning, earned media, influencers, and an eye toward personas and the buying jobs they need to complete through the end-to-end digital journey.

Advanced digital marketing provides engagement and progression of ICP accounts throughout:

- the awareness stage
- the entire funnel
- pre-pipeline efforts
- early-stage engagement

10. Research and advisory firm Gartner reveals that B2B buyers must complete six distinct activities — or “buying jobs” — to successfully complete a purchase. List the buying jobs below:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

Using the above list of “buying jobs,” list one example of a tool you might offer and one example of a piece of content you might develop to help your prospects complete each buying job.

Buying Job	Tool Example	Content Example
1.		
2.		
3.		
4.		
5.		
6.		

11. Using account insights and intent data allows us to develop a more personalized digital experience. Layering in the concept of helping B2B buyers complete specific buying jobs gives meaning and purpose to those experiences by defining \_\_\_\_\_.

12. With every ad impression, every pageview, and every chatbot conversation, your customers and future customers are:

- Making a judgment about you                       Learning more about you  
 Moving closer to opening an opportunity       Getting a feel for your culture

## BREAKTHROUGH MOVES FOR DIGITAL MARKETERS

13. The role of the digital marketer is more important than ever, with many possible breakthroughs.

Name these five:

Breakthrough	Description
1.	Shape your digital experience strategy based on what buyers care about, not what you want to promote.
2.	Understand how many and which accounts are newly or increasingly engaging with your brand, along with which personas across the buying team are engaged and which are not.
3.	Your creativity might be amazing and your email might be perfectly crafted, but if you don't offer a friction-free, meaningful experience at every single touch point, visitors will just move to the next result in their search.
4.	To help future customers complete essential buying jobs.
5.	There's a good chance you're the smartest banana in the bunch, but you're going to have to help the broader marketing team and sales team get set up and on board.

14. Today's digital marketing difference-makers can do more than ever before since they know where buyers are on their journey and what they care about, making it easier to personalize across channels. Let's look at some other things that modern digital marketers can do, and how. **Complete the table below.**

Modern Digital Marketers Can:	Because They Know:
Deliver superior digital experiences across channels throughout the account lifecycle	a)
Increase ROI across all tactics – Google, content syndication, display ads, and other media	b)
Uncover early-stage interest (even in the Dark Funnel™) and create demand through multi-touch programs	c)
Deliver hyper-personalized digital experiences at scale	d)
Maintain consistency in brand and message, across digital channels	e)
Be a hero to sales by accelerating the velocity of accounts through the purchase journey	f)

# DEMAND GENERATION LEADER: THE COO OF THE MARKETING DEPARTMENT

15. Once you light up the Dark Funnel™, you're not generating demand; you're:
- capturing it
  - converting it
  - nurturing it
  - driving it
16. For modern demand gen leaders, it's no longer about generating more MQLs; it's about fast-tracking in-market accounts and ensuring they're worked as effectively and efficiently as possible. One way to make this shift is to move from:
- Inbound to outbound marketing
  - Static to dynamic sales territories
  - Content marketing to digital advertising
  - Prospecting to experience-building
17. Forms and email are all about capturing demand that we can convert into opportunities. Yet they often have the opposite effect, driving buyers deeper into the Dark Funnel™. For modern demand gen leaders, it's all about engagement, which requires multiple tactics across multiple channels, targeting multiple personas in the account. This is called:
- Persona-based marketing
  - Account-based execution (ABX)
  - Journey mapping
  - Multi-threading
18. A standard "lead" or single buyer showing activity converts \_\_\_\_\_ % of the time.
- less than 10
  - less than 1
  - less than 5
  - less than 23
19. \_\_\_\_\_ are at the core of how demand gen can use buyer journey logic to hyper-target specific audiences across channels.
- Dynamic segments
  - Account insights
  - Buyer personas
  - Journey maps

20. Ultimately, the goal of orchestrating engagement is to meet the buyer where they are on their journey, follow them to the channels they prefer, and deliver:

- Qualified leads to sales
- Campaigns across every possible channel to ensure brand exposure
- Highly personalized, consistent, and relevant experiences
- Accounts that have not been identified yet in your CRM

21. Provide an example below of what AI-driven orchestration could look like:

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## WHAT ABOUT ATTRIBUTION?

22. An important part of a demand gen leader’s role is to know which tactics to keep and which to kill. Traditional attribution provides some potential help to determine what exactly is contributing to success. However, there are some downsides to traditional attribution. Name three.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## BREAKTHROUGH MOVES FOR DEMAND GENERATION

23. Demand gen is breaking through to deliver value in new ways. **Label the table below.**

Breakthrough	Description
1.	Determine which campaigns to run in order to capture the most 6QAs, and then etch that GTM plan into your brain and co-own the revenue operating model.
2.	Customer experience is your North Star, and you have the tools and data needed to patch leaks and improve opportunity conversion rates. Experiment with how you’re orchestrating engagement to find improvements.
3.	Implement disqualification and low-touch processes for accounts that aren’t a good fit. It’s okay to not spend a ton of time and resources on them. But have a plan so they are not hanging out to dry.
4.	Nothing is more important than really working in-market accounts. Remember, the goal is to replace cold calls with warm calls that are perfectly timed based on buying center analytics and in-market predictions. This is what sets teams up for successful calls – and part of how we put customers first.

24. As the demand generation leader, the marketing team looks to you to define the path to pipeline success. Get ready for the future full of new knowledge and capabilities. **Fill out the table below.**

Modern Demand Gen Can:	Because They Know:
Ensure sales and marketing teams are mobilized to work accounts with the highest likelihood to close	a)
Create customer/prospect-centric experiences that adapt as buyers' behavior changes	b)
Build, analyze, and adjust processes to optimize the revenue team's time and effort to ensure accounts are converting to opportunities	c)
Generate a higher ROI for programs	d)

## FIELD MARKETERS: THE FUTURE CHIEF MARKET OFFICERS



**BREAKTHROUGH:** You are the future CMOs, the quarterbacks of the Go-to-Market plan, and the masters of the mind-blowing moment. Understanding the IICP ensures all the amazing stuff you do actually makes a difference.

25. Segmentation capabilities can turn field marketers into \_\_\_\_\_ instead of \_\_\_\_\_.

- Campaign strategists/event planners
- Consultants/taskmasters
- Digital advertisers/menus and venues managers
- Experience creators/venue selectors

26. \_\_\_\_\_ capabilities allow field marketers to take programs to the next level, with multi-tactic campaigns that create these incredible experiences – at scale.

27. One of the key ways modern field marketers make a difference is by driving alignment between sales and marketing. A critical aspect of that is aligning on \_\_\_\_\_ so everyone is pursuing the same \_\_\_\_\_.
- Metrics/goals
  - A segment/accounts
  - Strategy/outcomes
  - Accounts/contacts
28. Field marketers are in one of the most powerful positions in the marketing department to deliver breakthroughs. **Complete the table below.**

Modern Field Marketers Can:	Because They Know:
Drive tight alignment between sales and marketing	a)
Maximize the impact from webinars, trade shows, dinners, and other events	b)
Accelerate pipeline by engaging the right accounts at the right time	c)
Orchestrate campaigns that generate a buzz leading up to, during, and after events	d)
Measure the success of field marketing events	e)

## BDRs, SDRs, MDRs MAKE THE MAGIC HAPPEN



**BREAKTHROUGH:** You are a big f'in deal. With work ethic, aptitude, and the right insights, you will do great things. Have the confidence to advocate for what you need!

29. Advisory firm TOPO recently published research that shows BDRs/SDRs/MDRs serve a critical function for world-class B2B sales and marketing teams. Their 2019 Sales Development Benchmark report found that people in these roles are:

The most significant pipeline drivers in world-class companies, averaging \$\_\_\_\_\_ in pipeline per month, drumming up \_\_\_\_\_ percent of the pipeline overall.

The most important channel for successful account-based programs, with \_\_\_\_\_ percent of account-based marketers citing outbound SDRs as an important channel in their marketing strategy. Because of this success, \_\_\_\_\_ percent of organizations have built a dedicated account-based SDR team.

30. The biggest challenge facing BDRs/SDRs is:
- Prioritizing their time
  - Having enough leads to work
  - Getting a timely response
  - Misaligned expectations with their AE
31. Nearly half of BDRs report that the prospect accounts they're working are not an ideal fit, leading to a high percentage of negative responses from prospects when trying to engage. How high?
- 42%
  - 28%
  - 74%
  - 57%
32. In one survey, BDRs identified six things they need to be more effective and successful.  
**List them below:**
1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_
  4. \_\_\_\_\_
  5. \_\_\_\_\_
  6. \_\_\_\_\_
33. There is a magic moment when an account transitions from just wanting to learn (anonymously) to wanting to engage. When does that occur?
- The moment the account inbounds
  - The moment the account moves from the awareness/consideration stages of the buying journey into purchase/decision
  - The moment the account moves from stage 2 to stage 3 in Salesforce
  - The moment the account moves from the target stage to the awareness stage of the buying journey
34. If you wait until an account raises their hand (inbounds), it's likely every other vendor in your space is engaging with them as well, meaning:
- You'll have to restart your cadences with a new group of contacts
  - Your likelihood of standing out is drastically reduced
  - You may need to reduce your price as the deal just got competitive
  - You're at risk of losing the prospect to competitive FUD

## AN END TO COLD CALLS

35. Cold calls aren't just a waste of time, they're also the perfect way to tank a BDR's confidence. Outbound calls can be done, but only if you know specific information about prospect, including:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

36. Rich account insights give BDRs far more confidence going into a call because they have the ability to immediately deliver \_\_\_\_\_ to the buyer.

- Pricing
- Value
- Justification
- Perspective

37. List the five rules for BDR breakthroughs:

- Rule #1: \_\_\_\_\_
- Rule #2: \_\_\_\_\_
- Rule #3: \_\_\_\_\_
- Rule #4: \_\_\_\_\_
- Rule #5: \_\_\_\_\_

38. BDR are a BFD and in a position to break through in many areas. Complete the table below.

Modern BDRs/SDRs/MDRs Can:	Because They Know:
Deploy outreach cadences to prioritized (warm) accounts, resulting in higher response rates	a)
Personalize outreach based on the account and contact's unique interests	b)
Engage the entire buying team rather than working leads	c)
Improve engagement rates and boost the number of meetings scheduled	d)
Strategically use tactics like direct mail to generate meetings and engagement	e)

# SALES LEADERS SET THEIR TEAMS UP FOR SUCCESS



**BREAKTHROUGH:** Modern tech and seamless alignment with marketing will help you fulfill your promise to give your team every advantage possible to win.

39. One challenge facing today's sales leaders is that sales and marketing often can't even agree on which fundamental metrics to use to measure success. For the metrics below, select which department cares more about the metric.

	Sales Cares	Marketing Cares
Accounts engaged	<input type="radio"/>	<input type="radio"/>
Deal velocity	<input type="radio"/>	<input type="radio"/>
Sales accepted leads	<input type="radio"/>	<input type="radio"/>
Accounts in market	<input type="radio"/>	<input type="radio"/>
MQLs	<input type="radio"/>	<input type="radio"/>

## WHERE DO WE HAVE LEAKS AND BREAKDOWNS?

40. If you're hearing things like, "These leads suck. Marketing isn't even qualifying them!" from sales or "Why are Tier 1 accounts not even getting touched?" from the marketing team, you know you've got:
- Poor sales and marketing leadership
  - Leaks and breakdowns
  - An ineffective GTM plan
  - A "culture" problem

## WHY DOES EVERYTHING TAKE SO LONG?

41. If you're finding that everything takes forever — from deploying a field program to closing a deal — it could be that your data is:
- Inadequate
  - In the wrong system
  - Lacking insights
  - In too many places
42. A customer data platform (CDP) is essential for breaking down data silos, deduping records, and cleansing data so you can make decision based on a single source of rich, accurate account data that you can:
- Use to determine what prospects really care about
  - Use for SEO
  - Integrate with other systems
  - Take action on

43. Complete the following:

Old World	New World
It takes forever — and a lot of back-and-forth — for sales and marketing to accomplish anything together.	

44. Modern sales leaders can work together with marketing to anticipate possible accounts and proactively uncover demand — ensuring that you neither \_\_\_\_\_ nor \_\_\_\_\_.

45. Complete the following:

Old World	New World
We miss opportunities because we either don't know about them, or we find out about them too late to influence their buying journey.	

46. As a sales leader, your only asset is your people, and their only asset is:

- Their data
- Their energy
- Their time
- Their determination

47. A difference-maker sales leader sets up sellers for success by giving them:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

48. Complete the following:

Old World	New World
Your sellers are flying blind, wasting their time on the wrong accounts with little insight.	

## ARE WE SHOWING UP THE RIGHT WAY IN FRONT OF PROSPECTS?

49. Every single interaction with a potential customer is a chance to reinforce your relationship. It's impossible to control all those interactions, but as a difference-maker sales leader, you can control \_\_\_\_\_ and \_\_\_\_\_.

- Who you hire/how prepared they are to deliver a killer experience
- Territory assignments/compensation plans
- The first call deck/the initial impression on prospects
- Your own communication/offer help those who come to you

50. For sales leaders, hiring difference-makers can be a challenge, but looking for aptitude and acumen, which is really a combination of natural ability and the capacity to exercise good judgment, is a great place to start. There is one other intangible worth considering. What is this trait you should look for in a new hire?

- Ego-driven
- Open-minded
- Optimistic
- Has the will to win

51. Complete the following:

Old World	New World
Sellers are ill-equipped to know your buyers and connect with them as humans.	

52. Leveraging cutting-edge technology across the entire process gives every member of your team the greatest chance at striking gold and offers breakthrough moments for every member of the sales team. Complete the table below.

Modern Sales Leaders Can:	Because They Know:
Help sales reps strategize on deals and prioritize actions to maximize win rates	a)
Scale success while rapidly hiring and growing the team	b)
Manage pipeline to ensure reps hit their number and avoid unpleasant end-of-quarter surprises	c)
Rapidly adjust to changing market conditions	d)
Ensure teams are not getting into deals late or missing deals altogether	e)

# SALES & ACCOUNT EXECUTIVES DELIVER THE GOODS



**BREAKTHROUGH:** You carry a lot of weight in the company and are on the hook to deliver the goods – use your voice to help others advocate for what they need! Every insight and advantage matters. Insist that they be made available to you.

53. Expectations of sellers are higher than ever, and the way buyers buy has shifted dramatically. For those who want to be difference-makers, advantages come in the form of the tech capabilities that have transformed the ways sellers sell with a competitive advantage. These capabilities ensure:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## IT'S ABOUT TECH ... AND SO MUCH MORE

54. The future of selling is going to dramatically shift with amazing new tech capabilities, giving sellers new opportunities for breakthroughs. Complete the table below.

Modern Sellers Can:	Because They Know:
Get in deals early by engaging with prospects before the competition	a)
Effectively manage their pipeline to meet or exceed their number	b)
Differentiate themselves by adding value throughout the buying process	c)
Win more often	d)

55. Small changes become habits, and new habits become a way of life. As US Navy Admiral William McRaven said in his now famous commencement speech, "If you want to change the world, start off by \_\_\_\_\_."

- Getting up early
- Eating a good breakfast
- Making your bed
- Changing yourself

# CHAPTER 6

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## TERMINOLOGY

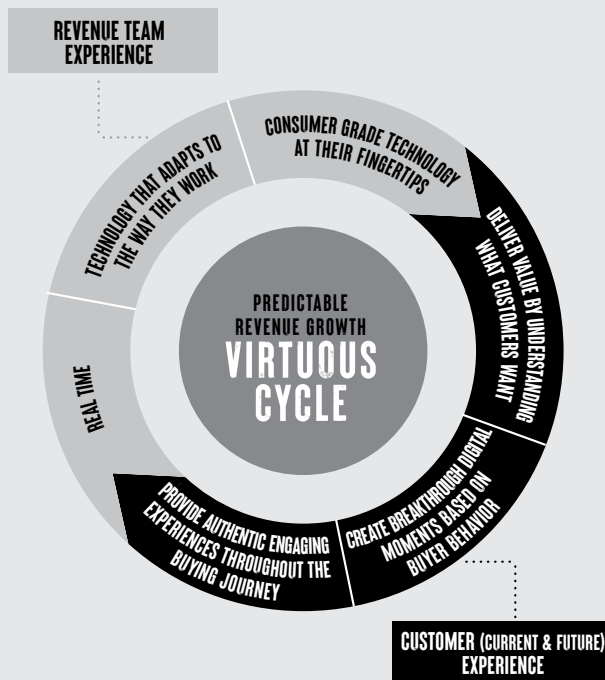
Draw a line to match the term with its definition.

- |                             |   |
|-----------------------------|---|
| Difference-Maker ●          | ● Prospect engagement, using multiple tactics across multiple channels, targeting multiple personas in the account.   |
| Virtuous Cycle ●            | ● Sales territories based on in-market accounts rather than geography.  |
| B2B Buying Jobs ●           | ● A list of target accounts that is automatically updated to add new accounts that meet the criteria to be included and remove accounts that meet the goal of the campaign using the segment. |
| Dynamic Sales Territories ● | ● People in the organization who get on the field, take risks, and have the courage to argue for what must change.  |
| Multi-threading ●           | ● Artificial intelligence that enables automated decision-making in the daily operations of sales and marketing.  |
| Dynamic Segment ●           | ● The identification of a set of user actions that contribute in some manner to a desired outcome, and then the assignment of a value to each of these actions.                               |
| AI-Driven Orchestration ●   | ● A complex chain of events that reinforce themselves through a feedback loop, resulting in a positive outcome.   |
| Attribution ●               | ● Six distinct activities B2B buyers must complete in order to successfully execute a purchase.   |

# CHAPTER 6

## ANSWER KEY

1. Grit and tenacity; Strong work ethic; Not afraid to provoke for the greater good; Curiosity; Discomfort with the status quo; Not clock-punchers
2. Virtuous Cycle
3. To create a unified approach to all things revenue
4. Customer retention; Customer loyalty; Customer satisfaction; Cost to serve; Revenue growth
- 5.



6. Self-serve access; Gatekeeper
7. a) How to light up the Dark Funnel™ and make data consistent, shared, and understandable

across the organization b) Where revenue teams should prioritize their time and money: ICP accounts, and more importantly IICP accounts c) How to create an account-based revenue operating model and shift from lead scoring to meaningful account-based metrics d) How to automate data enrichment and implement dynamic territories for sales e) How to orchestrate campaigns and outreach based on AI-driven predictions and buyer intent to drive engagement and ROI f) How to provide insights in a digestible, actionable way for frontline teams

8. True
9. The entire funnel
10. Problem identification; Solution exploration; Requirements building; Supplier selection; Validation; Consensus creation
11. Exactly what we want the prospect to do to move forward
12. Making a judgment about you
13. Understand buyer intent; Measure engagement; Focus on the experience; Develop content and tools; Make friends
14. a) An account's buying jobs, where they are in the buying journey, and how to deliver engaging experiences that help buyers progress in their journey b) How to ensure their dollars are spent on the best audiences: in-market ICP accounts c) What topics accounts and personas are researching and care most about d) How to create targeted segments based on where each account is

in the buying journey e) How to orchestrate multichannel campaigns both online and offline by connecting engagement channels to dynamic segments f) How many accounts are at each stage, how long they've been there, and which content and tactics are most effective at moving buyers forward

where accounts are on the buying journey; and when/how revenue teams should engage with them to ensure BDRs are working efficiently at an account and aggregate level d) Which tactics have the greatest impact in moving accounts through buying stages, resulting in pipeline and revenue

15. Capturing it
16. Static to dynamic sales territories
17. Multi-threading
18. Less than 1
19. Dynamic segments
20. Highly personalized, consistent, and relevant experiences
21. [Any of the following answers would be acceptable] If an account is a tier-one target and an executive-level persona registers for a webinar, prompt the AE to send a personalized email offering a demo; If an account is a strong ICP fit and moves to decision or purchase but then goes silent for 10 days, direct mail a gift to the key persona; If a director-level persona attends a demo, automatically invite a C-level persona in a specific job function to connect with one of our executives; If an account moves into the decision or purchase buying stage and is a strong fit for my ICP, automatically acquire missing contacts in the buying center and add key personas to a sales cadence for BDR outreach
22. Points for activities are awarded subjectively; Models are often complicated; Can hinder collaboration since it's too focused on awarding "credit"
23. Focus on in-market accounts; Leverage tech and insights to fix cracks; Eliminate time sucks; Mobilize the broader GTM team
24. a) The pipeline and revenue impact of focusing on 6QAs b) How to leverage AI and dynamic segments to reach ICP accounts with the right message on the right channel c) How to identify engagement stalls, cracks, and leaks;
25. Consultants/taskmasters
26. Orchestration
27. Metrics/goals
28. a) Where accounts are in their journey and which tactics to employ to move them forward b) Which accounts, contacts, and personas to prioritize – and what topics they care about c) How many accounts are at each buying stage and which are the best ICP fit d) Which dynamic segments to focus on and how to leverage everything from high-impact direct mail to digital campaigns e) How many accounts progressed through the funnel as a result of field marketing programs
29. 415K; 57; 88; 41
30. Prioritizing their time
31. 57%
32. More relevant accounts and prospects to target; Clearer buyer personas; Visibility into where prospects are in the buying journey; Tighter sales and marketing alignment; More time to do outreach versus wasting time on research, meetings, and administration; The ability to scale their efforts
33. The moment the account moves from the awareness/consideration stages of the buying journey into purchase/decision
34. Your likelihood of standing out is drastically reduced
35. Their role; What aspect of the business they are most interested in; Where they are in the buying journey
36. Value

37. Rule #1: Power outbound sales with personalization. Rule #2: Use a multichannel strategy with a mix of manual and automatic touches. Rule #3: Rely on templates, and personalize them with keywords and persona. Rule #4: Update materials and cadences quarterly; Rule #5: Don't give up on unresponsive prospects.
38. a) The identity of accounts showing intent, which ones are an ICP fit, and where they are on the buying journey b) What topics accounts and contacts care most about and how they've engaged in the past c) The composition of the buying team and each person's current level of engagement with the brand d) Which accounts to reach out to and how to perfectly time outreach sequences e) How many days accounts have been in the purchase and decision buying stages
39. Sales cares; Sales cares; Sales cares; Sales cares; Marketing cares
40. Leaks and breakdowns
41. Inadequate
42. Take action on
43. Decisions are made quickly and based on shared, trusted data
44. Miss opportunities; Come at them too late
45. We light up the Dark Funnel™ and begin to influence IICP prospects at the earliest stages of their research
46. Their time
47. An awesome territory; Prioritization within their territories so they can make use of every incremental moment; Prospecting insights to get connected with the best opportunities; Deal insights — including personas engaged and competitors involved — for every interaction throughout the deal
48. Your sellers use deep insights to prioritize accounts, multi-thread deals, and hone their interactions based on what they know about their buyers
49. Who you hire/how prepared they are to deliver a killer experience
50. Has the will to win
51. Bring on the X factor! Your prospects feel known and understood — and more likely to buy — because they've been treated well at every touchpoint
52. a) What accounts and contacts care about, how and when they've engaged, and the composition of the buying center b) How to design repeatable processes driven by data, from prioritizing BDR outreach to aligning with marketing for air cover during deal cycles c) How to work with revenue ops to design dynamic territories based on ICP fit and buying stage d) How to partner with marketing to determine the best campaigns to run e) How to uncover the Dark Funnel™ and ensure 6QAs get worked
53. The timing is right; Meeting prep gets even more personalized; Forecasting is grounded in reality; The teams are aligned; You have allies in negotiations
54. a) The identity of accounts showing intent and how and when they've engaged with the brand, even before prospects raise their hand b) How to prioritize accounts in their territories and coordinate efforts with BDRs based on ICP fit and predicted buying stages c) How to personalize outreach content, presentations, and demos based on the topics accounts and contacts care most about, and which personas and competitors are engaged in the deal d) How to engage the entire buying team within accounts, if engagement is trending in the right direction, when new competitors show up in a deal, and the key personas that need to be engaged
55. Making your bed

**Difference-Maker**

People in the organization who get on the field, take risks, and have the courage to argue for what must change.

**Virtuous Cycle**

A complex chain of events that reinforce themselves through a feedback loop, resulting in a positive outcome.

**B2B Buying Jobs**

Six distinct activities B2B buyers must complete in order to successfully execute a purchase.

**Dynamic Sales Territories**

Sales territories based on in-market accounts rather than geography.

**Multi-threading**

Prospect engagement, using multiple tactics across multiple channels, targeting multiple personas in the account.

**Dynamic Segment**

A list of target accounts that is automatically updated to add new accounts that meet the criteria to be included and remove accounts that meet the goal of the campaign using the segment.

**AI-Driven Orchestration**

Artificial intelligence that enables automated decision making in the daily operations of sales and marketing.

**Attribution**

The identification of a set of user actions that contribute in some manner to a desired outcome, and then the assignment of a value to each of these actions.

# CHAPTER 6

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## DOWNLOADABLE TEMPLATES & RESOURCES



### VIDEOS

- MakingSense of Account Based Metrics
- Visit 6th Street in RevCity, to learn how 6sense uses 6sense every day.



### EBOOKS / ARTICLES

- eBook: The All-in-One Guide to Account-Based Metrics That Matter
- eBook: BDRs are a BFD

## NOTES

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# AFTERWORD

## CHAPTER SUMMARY

Since the first edition of the book was published, we've gotten some great questions about how to put these modern sales and marketing approaches into practice. This chapter addresses any obstacles to implementation, such as metrics that replace MQLs. Latané covers cycle time, win rates, customer retention, and AI-fueled pipeline prediction. She delves into how to make the most of revenue moments, the benefits of a narrower purview, a new multi-threading manifesto, and the implementation of an authentic, spam-free nurture.

## KEY TAKEAWAYS

- You can still track MQLs if you want, but look at them as a signal — not a reliable or data-driven way to measure marketing's success.
- There are more critical revenue-driving metrics marketers to track, such as pipeline, cycle time, average selling price, win rates, and customer retention.
- Net revenue retention may be the most important measure of a company's promise, according to a survey of investors.
- Adopting a financier mindset will change the way you forecast pipeline.
- There's no trophy for working the hardest or having the biggest book of accounts. Honing focus and attention on fewer accounts can produce far better bottom-line results.
- If single-threading a deal is a bad idea, so is single-threading a lead. It's important to start multi-threading right at the beginning by identifying who's on the buying team and then engaging multiple stakeholders.
- Leaders need to measure the right things to ensure their teams are working all the qualified accounts on their lists, and that they're working entire accounts, not single leads.
- With the right data and tailored orchestration, we can send automated emails or nurture sequences that are not spam.

# KNOWLEDGE-BUILDING PRACTICE & EXERCISES

## HOW DO I KNOW (AND SHOW) MY MARKETING IS SUCCESSFUL?

1. To replace ubiquitous MQLs, modern marketers measure their success by how they're contributing to revenue. Which of the following are examples of effective KPIs worth tracking? **(Mark all that apply)**

- ASP
- Cycle time
- Customer retention
- Win rates
- Number of qualified leads

2. There are two ways to look at pipeline. The first is with a \_\_\_\_\_ mindset, the second is with a \_\_\_\_\_ mindset.

3. How is the sales channel comparable to a bottle of Dom Perignon?

- You need to wine and dine all your leads with your most expensive tools of persuasion
- It's a specific, costly channel only to be used in situations that merit it
- Champagne is the best way to make friends and influence people

4. Draw a line to match the term with its definition.

Competitive win rate ●

● Shows how well a company persuades buyers that indecision is costlier than action, accomplished through providing earlier-stage education to create problem and solution awareness, creating urgency, and by setting the stage for buyers to select a specific company's solution when they do decide to buy.

Non-competitive win rate ●

● Show how well a company makes the case that they are a better choice than similar players in the field, demonstrated through thought leadership, a compelling value story, high customer satisfaction scores, and effective messaging.

5. Retention is essential because of **(choose all that apply)**
- It's expensive to replace a customer
  - The blow to a seller's confidence can be devastating
  - Upsell and cross-sell opportunities disappear when a customer walks
6. What did one survey find was the most important metric for investors gauging a company's promise?
7. What is the main purpose of customer marketing? **(Choose the correct answer)**
- Case studies and reference management
  - Customer life cycle engagement
8. **True/False (circle the correct answer)**
- Your brand is what you say it is.

## MOVING FROM REPORTING TO FORECASTING

9. For marketers who want to elevate their game, think like a(n) \_\_\_\_\_.
10. What do you need to be able to do to make predictions about pipeline? (select all that apply)
- Assess historical trends
  - Understand current trends and data
  - Proactively address any potential issues in meeting revenue goals
  - Leverage up-to-date data to infer quarterly earnings
11. The most helpful way to think of an MQL is as (select all that apply)
- A measure of success
  - An indicator of pipeline goals
  - A target to hit
  - A signal to note
12. Which of the following are revenue moments? (select all that apply)
- A motherlode of MQLs
  - Accounts researching your competitors
  - Hiring activity
  - Publicly traded companies that file reports that mention problems you solve

# THE MENTALITY OF WORKING AN ACCOUNT, NOT A LEAD

13. True/False (circle the correct answer)

Having fewer leads can be a good thing.

14. The 6sense SLA sets the expectation that for inbounds, the rep will reach out to \_\_\_\_ people within \_\_\_\_ minutes. For 6QAs, the expectation is outreach to \_\_\_\_ people within \_\_\_\_ minutes.

15. Who said it?

“Inspect what you expect?”

\_\_\_\_\_

16. Statistically 6QAs convert \_\_\_\_\_ % better at two times the deal size, with a \_\_\_\_\_ % faster cycle time than non-6QA accounts.

17. What are the attributes that go into a quality outreach score?

- The right accounts are targeted
- The right personas are engaged
- Skillful personalizing
- A variety of channels are in play
- Social media is strategically utilized
- Appropriate gifting and calling are deployed

18. The average tenure in a BDR or SDR role is \_\_\_\_\_ years.

19. What helps Latané sleep at night? (select all that apply)

- Melatonin
- Blue light blocking glasses
- A sophisticated AI backup plan for a time-sensitive customer first touch

20. The three key data points for No Spam Nurture are (select three)

- Persona
- MQL
- Role
- Timing
- Logo status

21. The last thing you want to do during the beginning of a relationship is \_\_\_\_\_ something.
22. What are the tools a company needs for maintaining a competitive advantage? **(check all that apply)**
- Visibility into the Dark Funnel
  - A radical approach to how your sales and marketing teams create, manage, and convert pipeline to revenue
  - A meaningful buyer experience with no forms, no spam, no cold calls
  - Intrinsic motivation and willingness to adopt new ideas

# AFTERWORD

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## ANSWER KEY

1. Does not apply: Number of qualified leads
2. Sales mindset/marketing mindset
3. It's a specific, costly channel only to be used in situations that merit such fanfare.
4. Competitive win rate: second definition; non-competitive win rate: first definition
5. Not apply: The blow to a seller's confidence can be devastating
6. Net revenue retention
7. customer life cycle engagement
8. false
9. financier
10. all of them apply
11. indicator and signal
12. Does not apply: MLQs
13. true
14. 3, 6, 3, 20
15. Jason Zintak
16. 30%/30%
17. All apply
18. 1.8
19. AI backup plan
20. Not apply: MQL and logo
21. Ask for
22. All apply





# GUIDED DISCUSSION TOPICS

## IDEAS FOR DISCUSSION LEADERS

Use the scenarios below to help get your team thinking through the concepts, processes, and guidance presented in *No Forms, No Spam, No Cold Calls*. Whether you use them on your own or in a group discussion, these scenarios will help put your knowledge into practice.



**TIP:** Bring together members of your revenue team and have them switch roles to advocate for their new “role” and see things from a different perspective.

### Marketing Leader

Scenario: Your field marketing team is planning an upcoming summer roadshow targeting five US cities. Your AEs in the East insist New York and Boston have to be on the list, while your West Coast team is telling you San Francisco, Los Angeles, and Seattle are the critical for success, leaving your reps in Central out in the cold. How would you approach selecting the right target cities and get everyone to agree?

### Demand Gen Leader

Scenario: You’re being asked to “do ABM” on a list of your top 100 target accounts. Sales has pulled the list for you and wants your plan on how you intend to deliver a personalized digital experience for each of the accounts. All of the accounts are in your CRM, but only about 30% contain valid contact data. How do you proceed?

### SDR/BDR Leader

Scenario: Your SDRs/BDRs are frustrated with the fact that fewer people are engaging with their outreach efforts. They built solid messaging/scripts, but emails are going unopened and calls aren’t converting into meetings. There is growing frustration that these prospecting efforts are a waste of time. You know there’s gold in there, but it’s become clear that the approach isn’t driving account engagement, or pipeline. You set out to find the red. Where is the first place you look?

### Sales Leader

Scenario: A new competitor just entered your space and is not only showing up in deals, but is starting to win business away from you. You need to respond, and fast. When you dig in, you find out that your sales team is getting into these competitive deals late (or sometimes not at all), leaving the competition to influence the RFP and set the agenda. What’s your best course of action?

### **Marketing Ops**

Scenario: You've been asked to write a series of nurture emails for lost opportunity accounts. You know they fit your ICP, they've visited your website, and even downloaded some of your content, but you don't know much else. What insights would take these emails from spray and pray to targeted and personalized?

### **Rev Ops**

Scenario: Pipeline for the next quarter looks soft and sales leadership is getting nervous (again). You're being asked to put together a plan to "fix the pipeline problem." Your SDRs are telling you they need more leads to work, but when you look at the numbers you discover they have plenty of leads, and that it's your lead-to-opportunity conversion rate and your average deal size that are really the issues. What is your best course of action for finding and correcting the specific issues?

### **Demand Gen**

Scenario: You've finally decided to go all-in on an account-based approach, but right now you're only tracking MQLs and SQLs, and when you deliver the news to sales leadership that instead of producing 1,000 leads per month, marketing will now be uncovering 100 accounts per month, they flip out. How do you respond?

### **Sales/Rev Ops**

Scenario: You've been tasked with developing an account-based revenue model to help move from a lead-based to an account-based approach. What are the first three pieces of information you need?

# VISIT THE DIGITAL NEXT-GEN MARKETER CERTIFICATION HUB

## MORE RESOURCES FOR YOU AND YOUR TEAM

Access downloadable worksheets, sample documents, explainer videos, eBooks, and more on the 6sense Fundamentals of Next-Gen Marketer Certification Hub. Just go to [6sense.com/certprep](https://6sense.com/certprep).

Welcome Video from the 6sense Revenue Team

Downloadable PDF version of this workbook

### Downloadable Worksheets

- V2MOM
- Message Map
- Revenue Model
- GTM Plan
- And more ...

### Bingable Videos

- MakingSense - Diving into complex B2B terms (one bad joke at time)
- 6 for 6 - The 6sense team demos how we use our product every single day
- Selling with Intent - Conversations with top sales leaders

### Downloadable eBooks

- ABM is just Good Marketing
- The Science of B2B Selling - How Modern Sales Team Win Deals Now
- BDRs are a BFD
- The State of Predictable Revenue Growth Report
- The All-in-One Guide to Account-Based Metrics That Matter

## WHEN YOU'RE READY ... GET CERTIFIED!

### ONLINE ACCESS INSTRUCTIONS

When you're ready to take the certification test, just head over to [certified.6sense.com](https://certified.6sense.com) and select **Certification: Fundamentals of Next-Gen Marketing** to get started.

The online certification test is made of up 50 questions, covering all five chapters of *No Forms. No Spam. No Cold Calls*. It should take approximately 30 minutes to complete. Once you pass (80% or better score), you'll automatically be awarded a certificate and badge you can post to your LinkedIn or other social profile(s).











**FUNDAMENTALS OF  
NEXT-GEN MARKETING**  
**WORKBOOK & STUDY GUIDE**

