9 Sales Plays

to Ignite Personalization with Deeper Account Insights

The Rise of Account Intelligence

Increasingly, B2SMB solution providers—companies that sell to small to mid-sized businesses—need to take a sales and marketing approach that enables deeper connections and drives greater revenue by adding true personalization across the digital buying journey.

The key to unlocking this level of personalization starts with knowing which accounts to target first, then building sales plays targeted at the different personas within them.

BuzzBoard subscribes to the 'Account-first' approach to building the top of your funnel—employ data to define your Ideal Customer Profile. Then, build a highly accurate, bottoms-up, total addressable market estimation.

To adopt the 'Account-first' approach, we must also extend the consideration of data beyond firmographics and technographics to include digiographics—the inevitable digital footprint of SMBs.

This vastly expands the realm of account scoring and personalization to group and segment target accounts based on specific need, budget and growth triggers. The result is that every outreach in your GTM motion is more relevant and more actionable for your buyers.

Our objective with this ebook is to provide you with the context for using account intelligence data to accelerate your go-to-market motion when targeting SMBs, and then capture your imagination with 9 sales plays that most apply to businesses such as yours. Then, we'd be delighted to help you execute on it.

Table of
CONTENTS

The Power of Account Intelligence Data

Account Intelligence Data (AID) is data that measures a prospect's behavior, their activity in the market and provides context about propensity to buy in real time.

Account Intelligence Data (AID) is the foundation of any account-based strategy. It helps you determine a prospect's likelihood to buy in real time by delivering the contextual information you need to know about an account's digital maturity and need. By identifiying buyer need, you can start outreach before they demonstrate intent.

AID can be leveraged throughout the marketing and sales lifecycle, adding value at each step of the way.

Strategic uses of Account Intelligence Data include:

- ✅ Determining TAM (Total Addressable Market)
- ✅ Customer database hygiene
- ✅ Market segmentation and positioning
- ✅ Life Time Value analysis across segments or individual SMBs
- ✅ Account renewals and upsells
- ✅ Market trend analysis

Complex B2B sales cycles need more than just names and numbers. Staying on top of an ever-changing addressable market requires proactive intelligence that is frequently and continuously refreshed and brings prospects directly to a revenue team's workflow.

Until recently, it was not easy to assess the needs of SMB buyers because of the complexities involved in capturing and curating data around SMBs. However, this level of data can now be reached with a more modern approach using AI-based algorithms and robust data engines that are tuned specifically to SMB needs, triggers, and behaviors.

Read our comprehensive guide
'Account Intelligence Data—Unlocking personalization' for a deeper dive on the subject and the approach to gathering SMB Account Intelligence and creating your Ideal Target List.

Click here to download

The Steps to Unlocking High-Value Personalization

There's no doubt that personalization drives growth. The ability to tailor your messages or offers to the specific needs of your buyers and at scale is what will divide those businesses that grow from those that will decay over the next five years.

The process of unlocking high-value personalization starts with identifying SMB accounts with the highest revenue potential using the account intelligence data.

Identify growth-based signals

A digital signal is the condition or characteristics about an SMB — the digital footprint of the business. We call the collection of digital signals that represent a business, **digiographics**.

When you curate signals, you look for the most powerful in explaining an SMB action (generally a sale). Signals can help:

- ✓ Keep the sales process more efficient and higher-yielding.

- ✓ Determine how much need a business has for a product or service, keeping sales focused on the most qualified prospects.

- ✓ Identify and track the most promising accounts throughout the buying journey, saving time and closing more deals.

BuzzBoard

Create need-based segments

Metrics used to segment accounts today are mostly firmographic, such as business age, location, headcount, revenue or category. Unfortunately, in the digital era, these metrics are increasingly irrelevant for sorting and prioritizing SMB customers. They completely fail to capture the digital lifecycle stage of SMBs.

Unlike firmographic slices, BuzzBoard can segment based on disparate slices *(e.g. a slice by business age can be compared to a slice by vertical),* such as SMBs:

- ✅ In a given metro or country (e.g. metro Atlanta; USA)

- ✅ Verticals or micro-verticals (e.g. Dentists-orthodontics)

- ✅ Companies that are hiring, and/or meet a minimum threshold of digital advertising spend

- ✅ Meet a specific test (e.g. those running a specific vendor's product)

Or any combination of the above.

For example,
Multi-location CPAs with over 25 headcount per location, in greater Chicago and spending on digital advertising.

BuzzBoard

Apply account-based scoring

Account scoring is the process of sorting all the potential customers in an order from the most to the least valuable. The estimated value of an account is equal to the proximity to the ideal customer profile.

BuzzBoard's D Score

BuzzBoard has spent years perfecting a digital-centric lens for SMBs, called the Digital Score (D Score). The D Score:

- Is generated by BuzzBoard's proprietary data and algorithms.

- Captures every dimension of an SMB's needs and life, as seen through a digital lens.

- Draws on literally thousands of signals for each SMB—typically focusing on the top 100+— to help prioritize accounts by growth and need.

The scoring algorithm leverages both human experience and AI-driven analysis. It can also be customized to the context of a specific enterprise or product or service. And it can incorporate or be used in conjunction with other filters, such as selected technology groups.

The highly customizable D Score delivers a true representation of a business's digital maturity evolution against your product or service. A single number that can help benchmark a business within its category and at the same time provide insights into a business's growth arc.

BuzzBoard

Tell a story that solves a problem or meets a need.

Now you can take these segments and personalize a multi-channel conversation.

According to McKinsey, personalization will be the prime driver of marketing success within five years. That's because when done right, both businesses and customers win.

The most important differentiator in the **'account-first'** approach is that personalization is targeted at smaller segments with common business attributes and imminent needs—and personalization is centered around your customer's specific pain point, not just the engagement triggers that are more effective downstream.

You now answer to the below in order to really get to meaningful personalization:

What do they NEED, on top of WHO they are?

What are they open to? What is the opportunity?
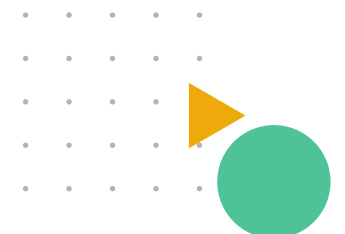
9 Sales Plays to Ignite Personalization with Deeper Account Insights

Playbook
1
Sales Training for Product

Playbook
2
Digital Advertising

Playbook
3
Email Campaign

Playbook
4
B2SMB Enrichment

Playbook
5
Content/Social Marketing

Playbook
6
Inbound Marketing

Playbook
7
Cross-sell, Up-sell, Win-back

Playbook
8
New Customer Acquisition

Playbook
9
Account Based Marketing (ABM)

9 Sales Plays to Ignite Personalization with Deeper Account Insights

With signals, segments, and scores, you can now tell a more accurate, relevant story according to each individual SMB buyer's need to drive a better conversation.

The power of deep SMB account insights can be best appreciated with the positive impact it has on acquisition and revenue strategy for any business that targets small to mid-sized businesses.

BuzzBoard provides SMB solution providers with the account intelligence they need to identify, segment, and take action on the revenue opportunities that will grow their business.

With BuzzBoard, it becomes easier for demand generation and sales teams to target the best-fit prospects for account-based marketing campaigns and for sales to skip "qualification calls" and start talking solutions.

We have identified these 9 winning GTM plays you can execute with AI-sourced, human verified account intelligence data.

Our data scientists and demand generation experts can help you adapt these sales plays to your business, or help you craft new ones of your own.
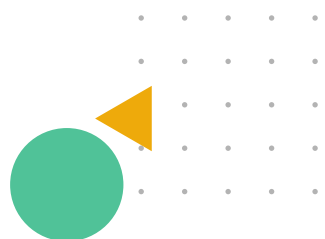
BuzzBoard

Playbook 1

Sales Training for Product or Service Recommendations

Who is it for: Sales Representatives and Sales Leaders

When the phone rings or email pops up, BuzzBoard will instantly surface recommendations on which products to sell, cross-sell or up-sell.

Use the recommendations to drive meaningful conversations that resonate with your customer's needs. Now sales reps can focus on having helpful conversations instead of trying to research each account for what to say.

Position each sales rep as a trusted advisor that is an expert in their category.

Instead of asking,

"What are your peak times of year?"

You can say:

"How do you drive more traffic in the months of March, August or December?" Or

"Do you know that Priority Chevrolet spends more on Google ads in the month of March—which is usually your peak season. Let's explore how we can get you better positioned to win during this time instead of losing out to your key competitor!"

Instead of asking who their main competitors is and how they are different, you can say:

"Did you know that Penske Truck Rental is spending more money advertising their mid-size truck rentals? Are you seeing sales go down at 1 Stop Auto as a result?"

BuzzBoard

Playbook 2

Digital Advertising

Who is it for: Demand Generation and Marketing Operations Practitioners

Buyer needs data can be most powerful when it is deployed at scale, in a mechanized fashion.

By tracking and acting on your prospects needs, you can begin offering a solution before they demonstrate intent to buy.

By integrating BuzzBoard to your CRM or marketing automation system through our data API, you can programmatically score accounts, at large volumes, as part of an account based marketing strategy.
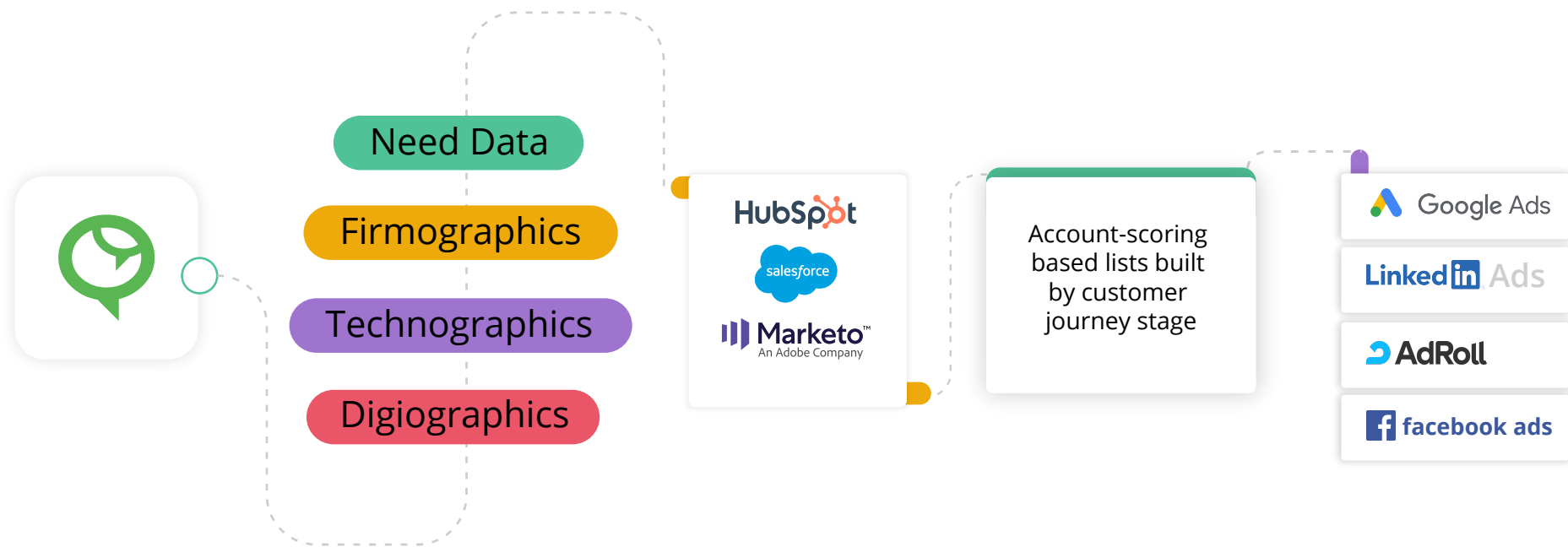
By integrating our data API to **Marketo, HubSpot** or other marketing automation system, you can build dynamic target lists of accounts or contacts, which you can then act on through automated e-mails, or through digital advertising by pushing those audience lists to ad platforms such as *Facebook, LinkedIn, Google Ads or AdRoll.*

BuzzBoard

Playbook 2

Digital Advertising

For example,

you could create dynamic lists based around **personal injury law firms** that spend advertising dollars on Facebook, and then push that audience list to Google Adwords or other ad platforms and target them with a custom offer and custom ad creatives tailored just for that audience.

Need Data

Firmographics

Technographics

Digiographics

HubSpot

salesforce

Marketo
An Adobe Company

Account-scoring based lists built by customer journey stage

Google Ads

LinkedIn Ads

AdRoll

facebook ads

BuzzBoard

Playbook 3

Email Campaign

Who is it for: Demand Generation and Marketing Operations Practitioners

With the high number of emails being delivered to inboxes daily, it's crucial to develop a personalized approach towards your customers and encourage them to open your message.

While email marketing may not be as exciting as some of the newer options available in digital marketing, it's still one of the most popular methods. The reason for this is simple – it works.

BuzzBoard

Playbook 3

Email Campaign

Product recommendations

If you want to increase revenue fast, start by reaching out to your existing customers based on their past purchases and their unique, individual needs.

Customized promotions

Based on a SMBs behavior or maturity, you can automatically email promotional offers most relevant to your customers across the customer lifecycle.

For example,

send an e-mail to prospects that have just increased spending on online advertising offering them a discounted upgrade to your next tier of SaaS product, premised on the notion they have increased funds to spend, and/are in growth mode.
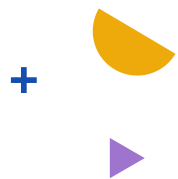
BuzzBoard

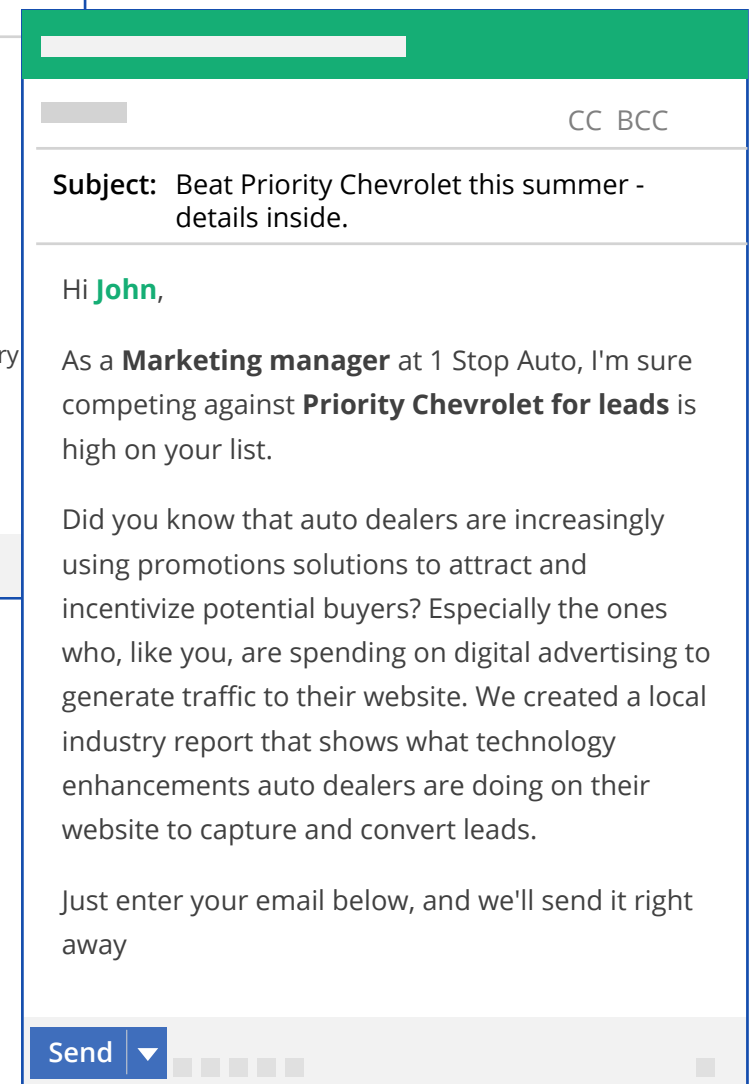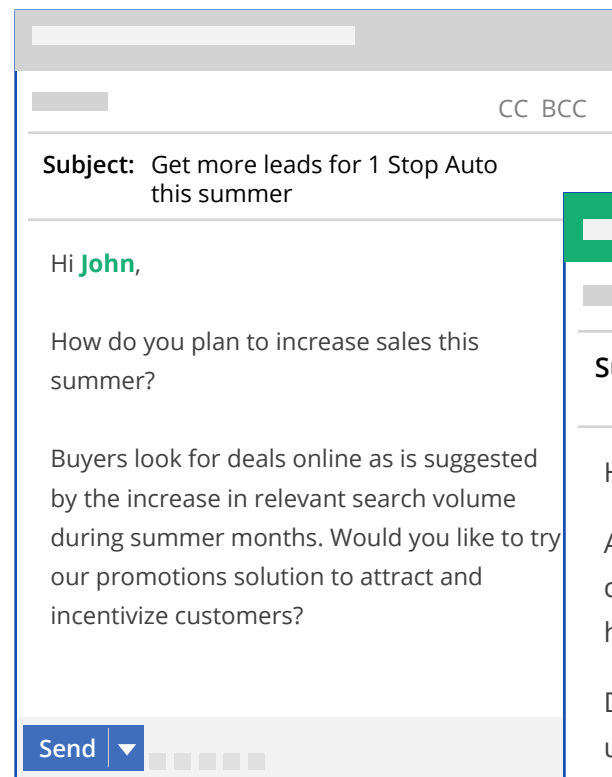**Playbook 3**

Email Campaign

Instead of an email that is:

Personalized Copy

From subject lines to email copy, you can use account-based intelligence to speak to each individual customer's needs or situation.

CC BCC

Subject: Get more leads for 1 Stop Auto this summer

Hi **John**,

How do you plan to increase sales this summer?

Buyers look for deals online as is suggested by the increase in relevant search volume during summer months. Would you like to try our promotions solution to attract and incentivize customers?

Send ▼

CC BCC

Subject: Beat Priority Chevrolet this summer - details inside.

Hi **John**,

As a **Marketing manager** at 1 Stop Auto, I'm sure competing against **Priority Chevrolet for leads** is high on your list.

Did you know that auto dealers are increasingly using promotions solutions to attract and incentivize potential buyers? Especially the ones who, like you, are spending on digital advertising to generate traffic to their website. We created a local industry report that shows what technology enhancements auto dealers are doing on their website to capture and convert leads.

Just enter your email below, and we'll send it right away

Send ▼

+

▶

BuzzBoard

Playbook 4

B2SMB Enrichment

Who is it for: Demand Generation and Marketing Operations Practitioners

Use BuzzBoard data and our thousands of signals to append and enrich your B2SMB database.

Support better segmentation and targeting for e-mail marketing and outbound digital advertising.

Enrich and append account and contact records in your CRM with corporate firmographic information like business size and technology use, but also with leading digiographic indicators of buyer need such as hiring plans, e-Commerce readiness and digital advertising spend.

Use BuzzBoard's database to build a more accurate, bottoms-up, picture of your Total Addressable Market (TAM).

Appointment Scheduling Software

Budget Signals

| Tech Spend | Ad Spend | Content on Website | Hiring |

| Security Score |

Need Signals

| Business Category | Strong Social Media Engagement | Tech Stack |

Plumbers | Roofers | Cleaning | Services | Dentist

| Presence on Marketplace | Advertising Mix |

Your Segments

Tech Spenders with Low ROI — 17.2K Prospects Count

Tech Spenders with Low ROI — 17.2K

Catch Them Young — 3.4K

Competitive Displacement — 1.3K

Dentists with
Employee Count 20 - 99

AND
✓ Online Video Platform
✓ Reputation Management Platform

AND
Hiring

AND
Runnign Ads

AND
Strong Social Media Presence

BuzzBoard

Playbook 5

Content/Social Marketing

Who is it for: Demand Generation and Marketing Operations Practitioners

With greater insights about your audience, you can determine what content is most relevant and what drives deeper engagement.

Leveraging account-based intelligence into your content marketing will help you become much more strategic in your planning.

This is because you can answer

"Why am I creating content?

Who am I helping?

How can I help my prospects more than my competitors?"

at a faster pace.

The key to building a content marketing strategy is understanding the key business and customer needs, plus a plan for how you want to use content across the entire buying journey.

With insights about growth, spend, adoption, and usage, you can better describe the specific audiences for whom you will create content and what their content engagement cycle might look like.

With a better understanding of their situation, potential pain points and likely needs, you can map out a content strategy that speaks to those elements.

BuzzBoard
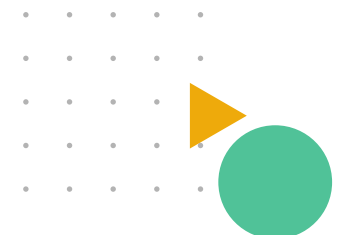
Playbook 6

Inbound Marketing

Who is it for: Demand Generation Practitioners and Marketing Leaders

Product Led Growth models and products at the lower end of the ACV spectrum rely on Inbound Marketing to keep customer acquisition costs in proportion to contract size. This means your inbound marketing model needs to be highly efficient and effective at scale, with large numbers of website visitors.

Once you have rich personalization data embedded in your CRM, you can create 1:1 inbound experiences with your prospects by enabling data dips to the CRM from your inbound chat bot or website personalization platform.

For example,

you could create a provocative statement to include in your chat bot dialog:

"**Hi** [company name],

It looks like you're aggressively hiring based on the number of job postings you have [discovered via BuzzBoard] - now's the time to subscribe to our applicant tracking system to manage all those candidates!"

BuzzBoard
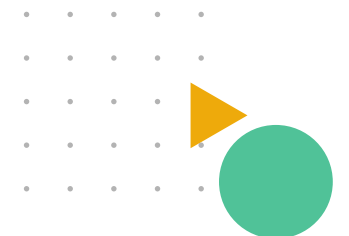
Playbook 7

Cross-sell, Up-sell, Win-back

Upload your complete list of accounts using Excel or through your CRM.

Our recommendation engine can instantly surface all the services your existing accounts need.

Instead of a customer care rep using firmographic data to sell a new product by asking:

"Do you need a more robust payroll solution?"

She can say:

"I see you are doing well and hiring for three new Sales positions. That is awesome. Our new payroll suite will help with filing risks as you grow. Let's get this added to your account so you can protect the business as you hire these three new employees."

With account-based intelligence, you can nurture these accounts with messages that resonate and build trust. Cross-sell and up-sell meaningfully.

Tech Recommendation

Payroll Solution

You're doing great with hiring! But without a robust payroll solution, you may expose your business to incorrect payroll filling risks, especially as you grow in size.

Video Conferencing

As an Employment Agency, using a video conferencing platform to conduct interviews will considerably help you improve your fulfillment rate.

Playbook 8

New Customer Acquisition

Upload your list of favorite customers and get a list of prospects with similar attributes from the BuzzBoard recommendation engine. Add the ones you like to your qualified lead funnel.

Conversations start with a need to increase engagement and position sellers as a trusted resource.

Instead of a cold prospecting email with basic firmographic information:

Subject: Does Smile Dental use Appointment Scheduling Solution?

Hi,

We offer an easy, all-in-one Appointment Scheduling solution for small businesses for as much as 30% less than other providers.

Would you like to check into what we offer?

We are a one stop solution to engage your customers and manage your business.. All I'd need is the best number to have a quick chat.

You can create a prospecting email that includes greater intelligence for your buyers—and helps you stand out from the crowd.

Subject: Increase Your Dental Appointments by 51% for Your Current Digital Advertising Spend.

Hi Claire,

Your dental practice is quite popular and you are driving demand using digital advertising.

While customer experience and engagement seems to be your top priority, you could be losing clients without the option to book appointments online.

51% of dental appointments are booked online and many prefer this over phone bookings.

Would you like to learn more about our online booking solution and how it can help your dental practice improve operational efficiency?

BuzzBoard

Playbook 9

Account Based Marketing (ABM)
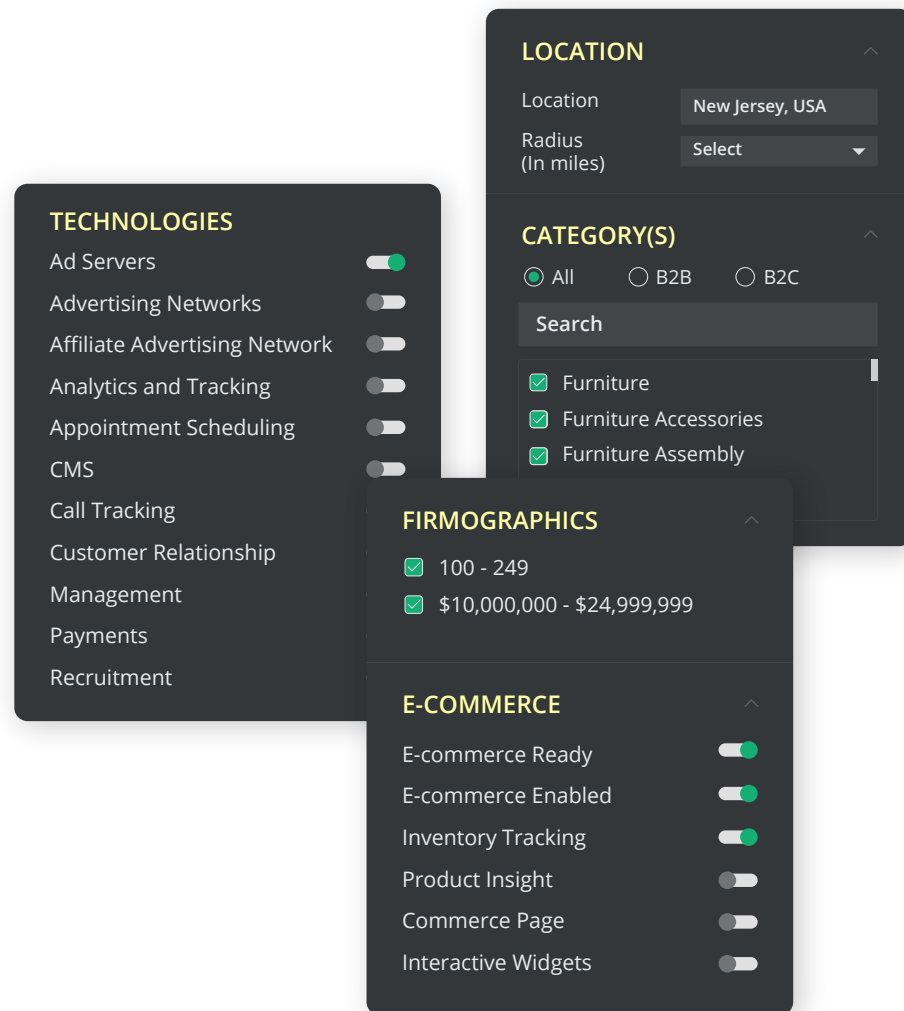
A personalized marketing approach like ABM means teams need to shift the foundation of their marketing efforts from a volume-based contact list to starting with a targeted account list and then defining a lower-volume, but more precise per-account contact list.

Build your ABM target account lists based on BuzzBoard thousands of firmographic, technographic and digigraphic signals that telegraph their need to buy your offering.

Manually select and add accounts to your CRM, or integrate BuzzBoard to your CRM via our API and automate account rankings with a custom CRM formula field that scores the account based on BuzzBoard signals. Additionally, BuzzBoard has its own AI driven account scoring algorithm based purely on an SMB's digital maturity that is customizable to your specific offering.

Now with accounts tiered according to highest revenue potential, you can run coordinated sales and marketing cadences.

BuzzBoard

Sales Play 1

Sell new security platform to early high growth, high need SMBs

ABM Lite - 10-100 accounts:

Businesses that share similar business attributes, challenges, and initiatives.

Play

Generate demand for new security tool for remote employees and devices with a free risk assessment to highest revenue potential accounts based on ICP.

High touch, high-value personalization campaign on the risk to employees and customers that don't have certain security measures in remote locations and devices.

Content Play

Upper funnel

New Security research report: New research highlights gaps in security puts a majority of SMBs at risk as employees stay remote.

Mid funnel

Webinar: thought leadership talking about top 5 risks to small businesses that are shifting to remote environments.

Bottom funnel

Offer: Security Risk Assessment - Full analysis and assessment with recommendations to lower security risks.

BuzzBoard

Sales Play 2

Launch a new product into existing and new markets.

Programmatics ABM: 100-1000s accounts

ABM-inspired tactics across 100s or even 1,000s of identified accounts.

Play

New segment

Launch a competitor takeaway play

Identify new accounts that match your ideal customer profile and use your competitor product.

Offer: Want to save money? Get the Buyers Guide

Upsell/Cross-sell

Help your fastest growing customers improve security posture

Identify customers who are actually using your product, and actively hiring new employees, and have a high risk score.

Offer: Free for three months for existing customers.

Win-back

Identify accounts that are in a closed lost opportunity status at least 6 months ago that are facing some new, upcoming, critical event deadline and may be in deep need for your solution.

Offer: Come take another look and try us free for three months.

Selling Effectively Using Account Intelligence Data

BuzzBoard

Selling is essentially storytelling. And for any story, we like to follow the simple three-step Context, Conflict, Resolution.

Context

This is the setup or framing of the discussion you're about to have with your prospect.

"I've been doing some research for car repair shops because I've worked with over 10 in your area. "

Conflict

This sets the dramatic tension for the audience that pulls them into the story.

"Did you know that Sam's Auto Club in your area is getting more traffic than you? Are you getting left behind?"

Resolution

Audiences like tension, and the accompanying drama, but they also need the tension to be relieved or at least a path to resolution.

"If you want to see how you stack up, make sure to get your custom digital report."

Try mapping some of your existing sales plays to this model, and see how they fit. Reach out to us if you'd like some help.

How to Measure Success

Your go-to-market strategy should reflect where an account or group of accounts is in the buying journey, and how much that account either knows you or has expressed interest in your solution.

For organizations that want to execute more account-based approaches, you will want to measure success differently than approaches that are centered around lead quantity or lead scoring.
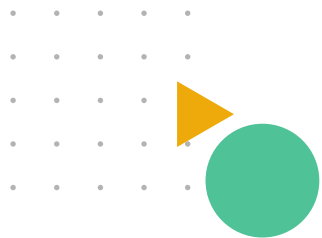
For account-based programs, you'll want to measure

Account engagement

> Meetings, webinar engagement, form fills, etc.

Marketing qualified accounts (MQAs)

Marketing qualified leads (MQLs)

> MQLs still matter! But use them to help qualify MQAs.

# of opportunities / pipeline value / pipeline velocity

Average deal size

How to Add Science with BuzzBoard Account Intelligence

BuzzBoard powers demand generation performance by identifying, segmenting, and scoring the accounts that matter based on the ideal customer profile of your business.

BuzzBoard sets itself apart from other data providers with its:

Robust AI-driven recommendation engine tuned specifically to SMB needs, triggers, and behaviors.

AI-sourced and human audited data on over 30 million SMBs worldwide.

Proprietary SMB signal stack and categorization system that unlocks deeper insights for high-value personalization.

With BuzzBoard, sales and demand generation teams no longer have to rely on manual efforts and heavy lifting to identify best-fit accounts and the contacts to engage within them – BuzzBoard delivers data they can count on.
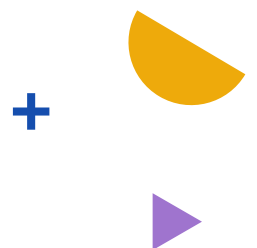
BuzzBoard

How Does BuzzBoard Collect SMB Account Intelligence?

For years, BuzzBoard has been collecting and analyzing the digital essence of SMBs with its ability to identify URLs and micro-categories. Its AI-sourced engine draws on literally thousands of signals for each SMB - typically focusing on the **top 100+**, while others are retained in a data lake for future use. This helps BuzzBoard's algorithms generate an account based scoring model that leverages both AI-driven analysis and human experience.

Today, more than **6,400 signals** are captured per SMB, from over **30 million accounts** worldwide, and refreshed every 30 days. Our deep analysis then searches each signal within an SMB's digital footprint and identifies relationships to other products and platforms - both within and outside the SMB.

This deep data collection and ongoing analysis is used to power **AI-based** recommendations engines that guide sales and renewal conversations. This approach helps solutions providers identify SMBs that are growth-oriented and are more qualified to purchase their products or services.

BuzzBoard

Signals that are identified and analyzed include:

Environment

| Micro-segment (granular business category)
| Overall business model (including ecommerce)
| Brands carried
| Key competitors

Operations

| Locations
| Revenues
| Headcount
| Technology spend
| Affiliations

Digital Footprint

| Advertising mix and spending
  Social media presence
| Appearances in directories and review sites (and the ratings)
| Search strategy (paid, organic, retargeting)

Technology Stack

| Platforms and systems used for email
| CRM
| Content management
| Digital advertising
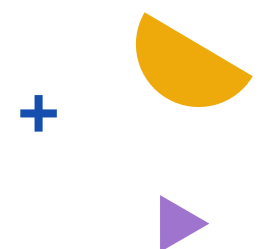
Signals that are identified and analyzed include:

Technology Stack

| Platforms and systems used for email

| CRM

| Content management

| Digital advertising

| Mobile

| HR

| Payments

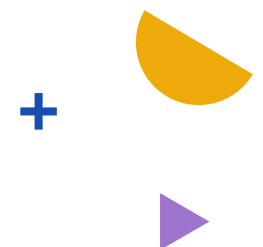| Financial management

| Telecommunications

Purchase Triggers

| Need and ability to purchase specific products or services (this information is inferred from multi-factor analysis incorporating AI)
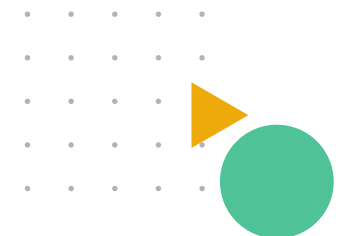
Risk Exposure

| Risks to platforms

| Infrastructure

| Operations

| Privacy policies

| Overall security

Where Can BuzzBoard Account Intelligence Live?

Account intelligence can fuel your sales engagement, management, and automation platforms including:

Conclusion

Investing in more data providers and filling CRMs with more unqualified records won't solve the data quality problem for today's sales and marketing teams. If B2SMB solution providers want to adopt more personalized marketing approaches that are proving to improve ROI, then leveraging AI-sourced account-based signals, segmentation, and scoring are the keys to ABM success and telling the right story.

Contact BuzzBoard today to see how easy it is to identify, segment, and tier your most qualified accounts, and take action on them.
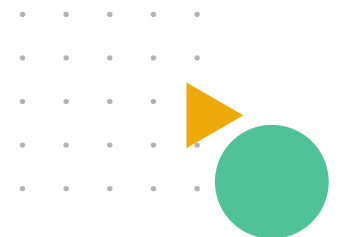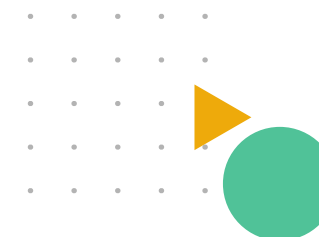
About BuzzBoard

BuzzBoard is fueled by over 20 years of acquired intelligence on 30+ million small-to-medium businesses to help solution providers deeply understand their customers and build trusted relationships in today's digital-first selling environment. BuzzBoard's AI-powered intelligence engine powers account-based marketing and sales performance using its proprietary SMB signal stack and category classification system to identify, segment, and score the accounts with the highest revenue potential. With BuzzBoard account intelligence fueling CRM and marketing automation platforms with ideal customers, demand generation and sales teams now have the insights and recommendations they need to acquire and retain customers with highly personalized interactions at scale.

BuzzBoard, Inc. 345 California St., Suite 600, San Francisco, CA 94104
www.buzzboard.com