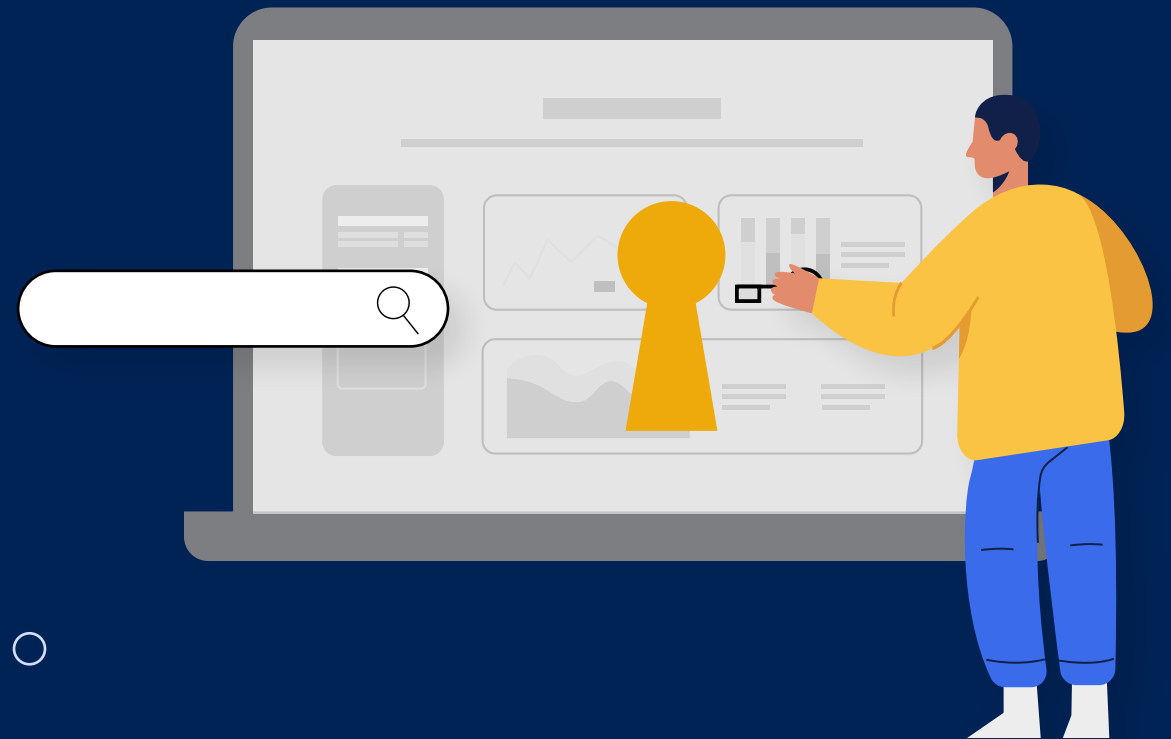


Account Intelligence Playbook

Unlocking Personalization



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.

The challenge for sales, marketing and demand generation teams executing an account-based approach is that CRM and marketing automation tools weren't designed to be account-centric.

Further, highly granular data on SMBs has been hard to get.

To help you succeed at account-based marketing, we designed this ebook for teams making the shift or looking to scale their 'account-first' efforts by outlining:

- 1 | The Power of SMB Account Intelligence Data
- 2 | 4 Steps to Gather Account Intelligence to Create your Ideal Target List
- 3 | 9 Sales Plays to Ignite Personalization with Deeper Account Insights
- 4 | How to Collect and Maintain Account Intelligence with BuzzBoard

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 one of the sales plays that most applies to your business. Then, we'd be delighted to help you execute on it.

Table of CONTENTS

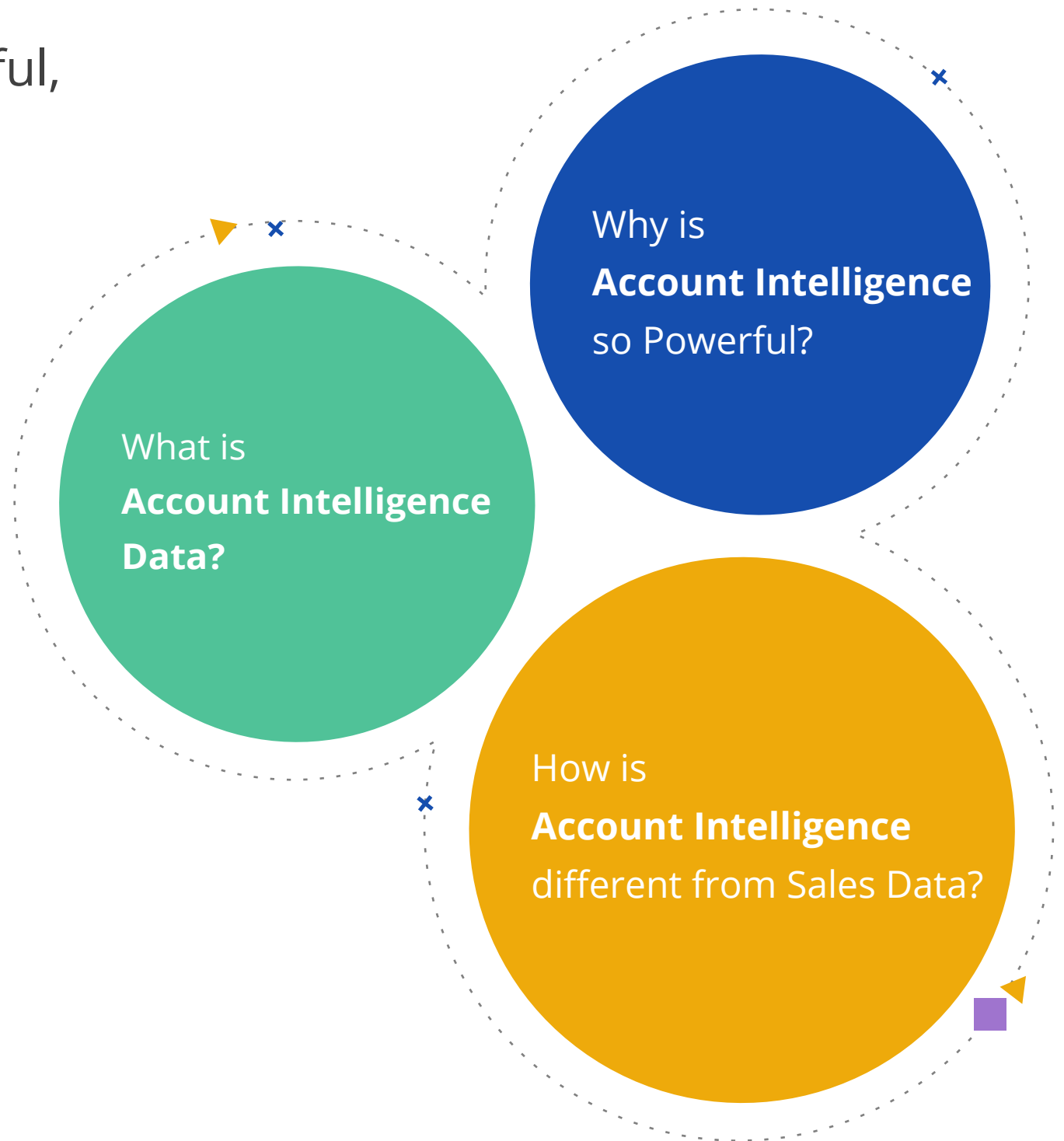
The Power of Account Intelligence Data	05
> What is Account Intelligence Data?	06
> Why is Account Intelligence so Powerful?	07
> How is Account Based Intelligence Data (AID) Different from Sales Data?	08
4 Steps to Gather SMB Account Intelligence to Create your Ideal Target List	09
> Step 1: Identify Growth-based signals	11
> Step 2: Segment Account Lists	15
> Step 3: Apply Account-based Scoring	19
> Step 4: Tell a Story that Solves a Problem or Meets a Need	21
9 Sales Plays to Ignite Personalization with Deeper Account Insights	23
How to Measure Success	25

Table of CONTENTS

How to Add Science with BuzzBoard Account Intelligence	26
> How Does BuzzBoard Collect SMB Account Intelligence?	27
> Where Can BuzzBoard Account Intelligence Live?	30
Conclusion	31

The Power of Account Intelligence Data

What is it, Why is it so Powerful, and How is it Different?



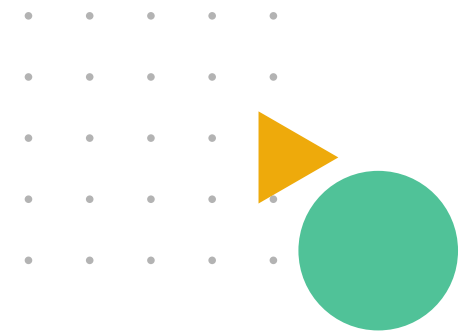
What is Account Intelligence Data?

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.

It is the insights needed to engage with prospects at a personal level.

A recent article from Forbes described how Account-based Intelligence provides the information needed to:

- ✔ Identify the most qualified businesses to contact
- ✔ Determine the moment when prospects are ready to make a purchasing decision
- ✔ Develop the highest impact messages to deliver to each prospect



Why is Account Intelligence so Powerful?

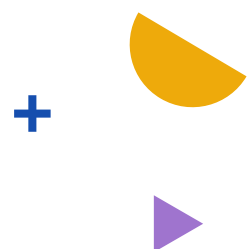
Teams are now shifting to account-based marketing approaches where accounts are thoughtfully identified, marketed and sold to in a personalized way—but only after thoughtfully defining an Ideal Customer Profile and corresponding target set of accounts.

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.

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



How is Account Intelligence Data (AID) Different from Sales Data?

Sales data provides information about a contact or company such as size, location, revenue, focus, email, category, engagement history, and more. It is what teams need to move deals through the sales cycle. Sales data is a necessity for an effective sales team.

But that data is really only the first step.

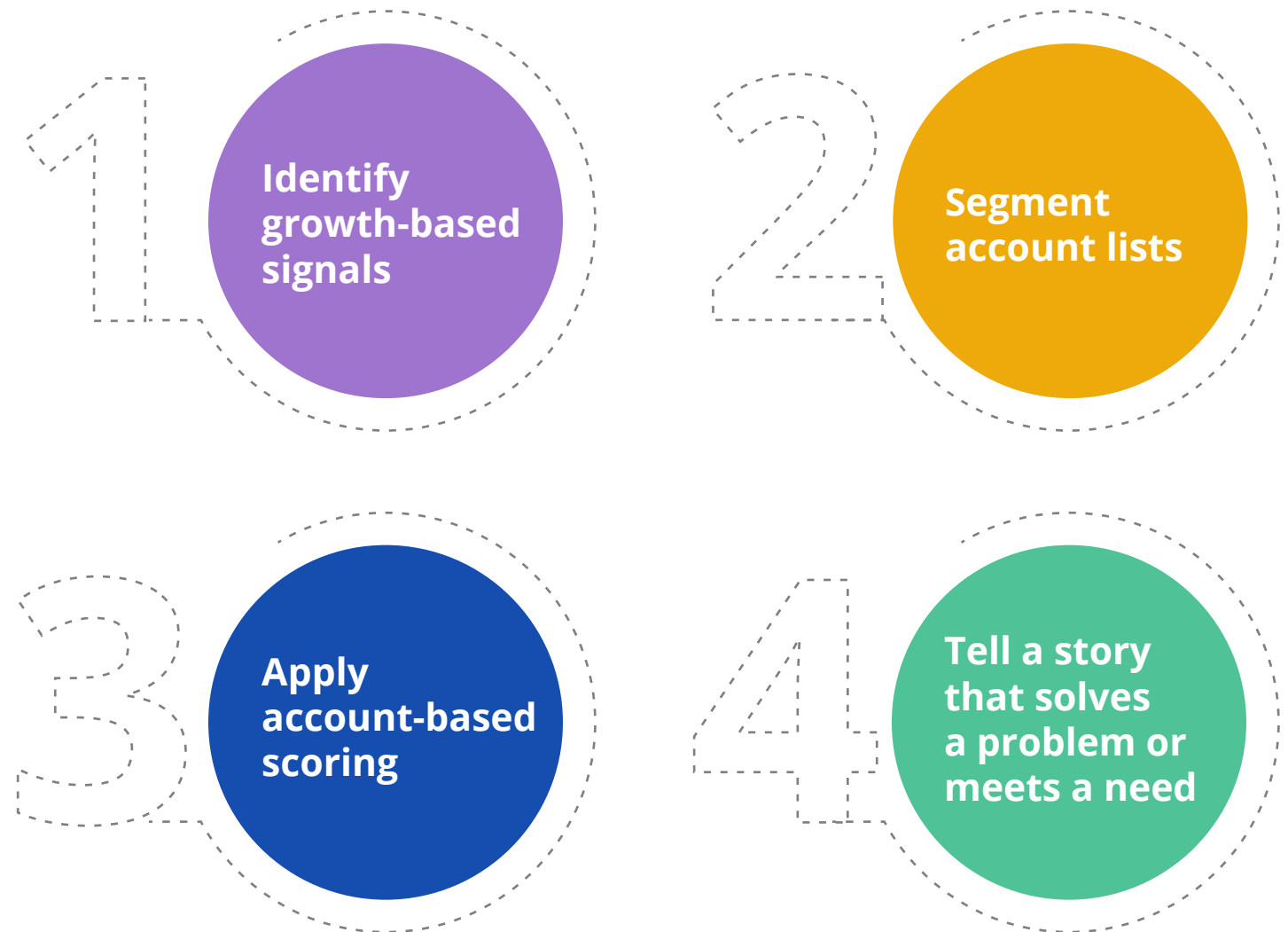
AID allows you to turn that data into an action plan. It changes a sales person from hunting down information on their accounts to being able to filter through the sea of data and focus on the important information that can be used to get a deal closed. It helps marketers understand their ideal customer profile and improve data quality.

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.

Developing a system that can pool and analyze structured and unstructured data, algorithms that can identify behavioral patterns and customer propensity, and analysis capabilities to feed that information into CRM and other sales and marketing automation tools can help organizations turn data into intelligence that fuels their competitive edge.

4 Steps to Gather SMB Account Intelligence to Create your Ideal Target List

The Steps to Unlocking High-Value Personalization



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.

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

Below are the keys to identifying the SMB accounts with the highest revenue potential:

- 1 Step 1**
Identify growth-based signals
 - What are signals?
 - Why are signals important? Why do they matter?
 - What is unique about signals as it relates to SMBs?
 - How do you capture signals?
- 2 Step 2**
Segment account lists
 - What are segments?
 - BuzzBoard's approach to segmentation:
 - Why are segments important?
 - How to segment
- 3 Step 3**
Apply account-based scoring
 - What is an account score?
 - BuzzBoard's D Score
- 4 Step 4**
Tell a story that solves a problem or meets a need.
 - What is personalization?
 - Why is personalization important?

Step 1

Identify Growth-based Signals



What are signals?

Buying signals are behavioral cues that indicate the intentions of prospective or existing customers in terms of their readiness to buy. When we're talking to or meeting with prospects, we're looking for verbal or other such cues. These insights help sellers to close a deal.

Before you are directly engaged with prospects, you don't have access to these verbal or physical cues. However, you can leverage their online digital signals.

A digital signal is the condition or characteristics about a SMB that manifests from their online presence — the digital footprint of the business. We call the collection of digital signals that represent a business, digiographics.

These digital signals are the key to an account centric approach to segmentation and targeting and empower you to pick the right accounts to pursue.



Step 1

Identify Growth-based Signals

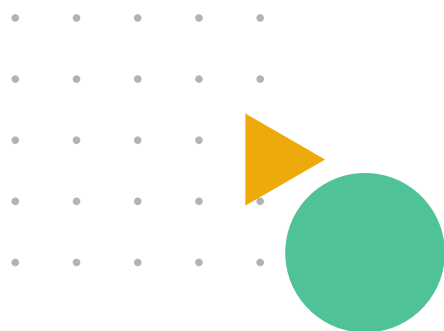


Why are digital signals important? Why do they matter?

When curating digital signals, you look for the most powerful indications of an SMB action (generally a sale).

Digital 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.



Step 1

Identify Growth-based Signals



What is unique about digital signals as it relates to SMBs?

There are two reasons it can be difficult to gather digital signals about SMBs:

The business URL: Our analysis shows that only 30% of CRM records contain an SMB's website.

The URL is the bridge from the external world into the SMB's internal processes and operations. The URL opens up the deep data (and associated analysis) that are needed for high-value personalization.

The business category: Most business category systems are based on the NAICS schema. This often isn't granular enough to identify many highly specialized SMBs or those using new business models.

A "micro-segmentation" classification is needed, which requires more data than is typically available in CRMs today.



Step 1

Identify Growth-based Signals



How do you capture digital signals?

Capturing this massive list of signals requires more advanced approaches than what humans can do on their own. Deep data analysis and recommendations rely on machine learning (ML) and artificial intelligence (AI) to consume, analyze, and reflect changes in a business's lifecycle.

As we collect more intelligence, the ML/AI capability kicks in and does the heavy lifting from that point onward.

If you're not able to capture AI-sourced intelligence, you can capture signals from:

- ✓ First-party data from your website
- ✓ Customer comments or reviews
- ✓ News articles about expansion or growth
- ✓ New job openings or new hires
- ✓ Headcount growth
- ✓ Technographics
- ✓ Third-party data
- ✓ CRM and marketing automation data



Step 2

Segment Account Lists



What are segments?

Market segmentation is the practice of dividing your target market into approachable groups. It creates subsets of a market based on demographics/firmographics, needs, priorities, common interests, and other psychographic or behavioral criteria used to better understand the target audience.



BuzzBoard's approach to segmentation

Metrics used to segment accounts today are mostly firmographic, such as business age, location, headcount, revenue, category or annual revenue. Unfortunately, in the digital era, these metrics are increasingly irrelevant for sorting and prioritizing SMB customers.

The incoming stream of SMB prospects at the beginning of the sales funnel is typically chaotic and amorphous.



Step 2

Segment Account Lists

BuzzBoard's approach to segmentation

While one-dimensional firmographics may help add structure to this stream, 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)
- ✓ Competing with a given SMB

Or any combination of the above (e.g. multi-location CPAs with over 25 headcount per location, in greater Chicago and spending on digital advertising).

BuzzBoard's account-based scoring system along with other filters, such as specific technology groups, can be added to the score to tailor each filter to the specific needs of the business.

Step 2

Segment Account Lists



Why are segments important?

Market segmentation helps your business efficiently target resources and messaging at specific groups of buyers.

This allows you to:

- ✓ Create stronger marketing messages
- ✓ Target your digital advertising

- ✓ Improve response rates
- ✓ Lower acquisition costs
- ✓ Attract the right customers
- ✓ Increase brand loyalty
- ✓ Differentiate your brand from competitors
- ✓ Identify niche markets
- ✓ Stay on message
- ✓ Drive growth
- ✓ Inform product development



Step 2

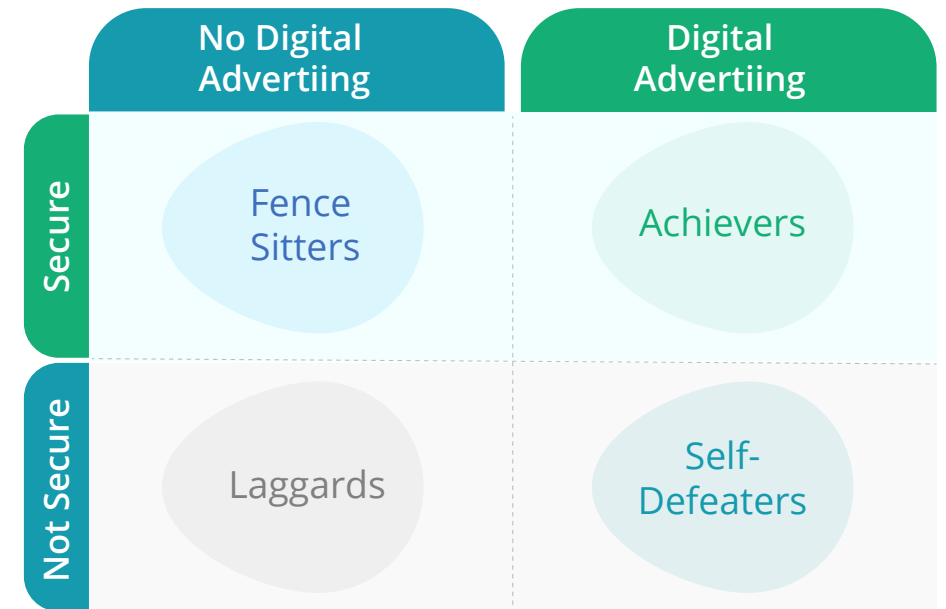
Segment Account Lists

How to segment

With deeper insights using the digital maturity lens of an account, you can create a 'Need Vs. Budget' based 2x2 matrix to identify the market you want to play in and the conversation to have.

The 2x2 matrix approach, with its 4 quadrants, is a valuable tool for drilling into a set of SMBs to identify specific characteristics and needs. The 2x2 approach allows multiple parameters to be considered at the same time.

Each quadrant shows a different stage of the SMBs maturity and readiness in consuming technology and other services, in the combination of "Need" and "Budget".



▶ Each quadrant shows a different stage of the buyer's journey the SMBs would be in.

Need Only

Future prospects, cultivate relationships, offer freemiums (where applicable)

Both Need & Budget

The Sweetspot...get them now

Low Budget or Need

Leave them alone

Budget Without an Inherent Need

Not your customers

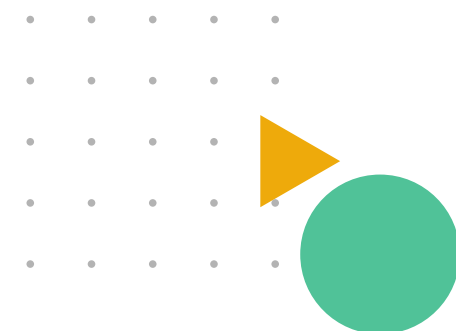
Step 3

Apply Account-based Scoring



What is an account score?

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.



Step 3

Apply Account-based Scoring



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.

This level of customization 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.

Step 4

Tell a Story that Solves a Problem or Meets a Need



What is personalization?

Marketing personalization, also known as personalized marketing or one-to-one marketing, is the practice of using deep data to deliver brand messages tailored to an individual prospect. And in today's digital-first world, it is no longer a "nice to do," but a must-do in order for your business to grow.

With billboards, cold calls, mailings, and more, traditional marketing emphasized the quantity of messages over their relevance. Later, analytics became more sophisticated and data on individual prospects grew.

Today, marketers take advantage of both to deliver to prospects the most relevant message at the ideal time.

Personalization is the evolution from marketing communications to digital conversations, with data as the starting point.



Step 4

Tell a Story that Solves a Problem or Meets a Need

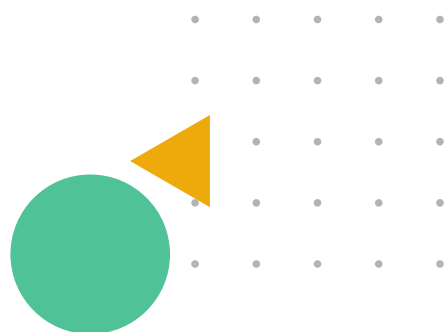
○

Why is personalization important?

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.

Some of personalized marketing's main benefits include:

- ✓ A more satisfying customer experience
- ✓ Increased customer loyalty
- ✓ A better return on your marketing investment
- ✓ Accurately predict how each customer will respond to your product or service



9 Sales Plays to Ignite Personalization with Deeper Account Insights

With the 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 account insights while selling to SMBs can be better appreciated with the positive impact it delivers to practically every aspect of acquisition and revenue strategy within any and all business setups that target 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



- 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)

Get a deeper dive into one or more of these 9 winning plays and learn how BuzzBoard's Account Intelligence Data aids in setting each of these in motion for most effective personalization.

[Request a copy of our playbook](#)

'9 Sales Plays to Ignite Personalization with Deeper Account Insights'

[Click here](#)

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.

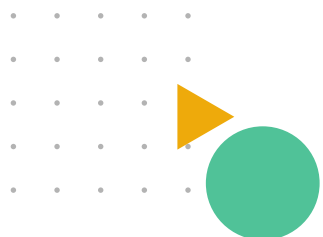
Marketing qualified accounts (MQAs)

Marketing Qualified Accounts (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.

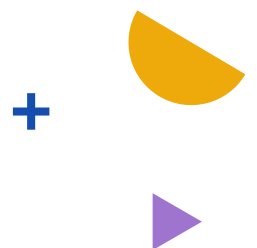
BuzzBoard sets itself apart from other data providers with its:

| 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.



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.

How Does BuzzBoard Collect SMB Account Intelligence?

Environment

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

Operations

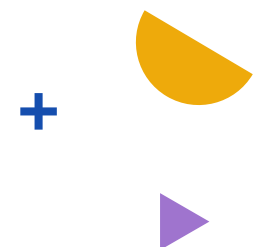
- | Locations
- | Revenues
- | Headcount
- | Technology spend
- | Affiliations

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



How Does BuzzBoard Collect SMB Account Intelligence?

Technology Stack

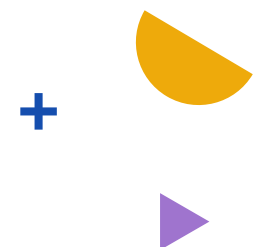
- | Platforms and systems used for email
- | CRM
- | Content management
- | Digital advertising
- | Mobile
- | HR
- | Payments
- | Financial management
- | Telecommunications

Purchase Triggers

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

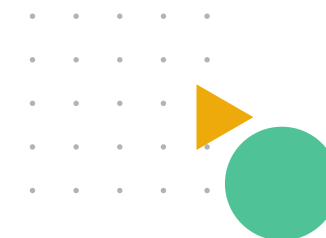
Risk Exposure

- | Risks to platforms
- | Infrastructure
- | Operations
- | Privacy policies
- | Overall security



Where Can BuzzBoard Account Intelligence Live?

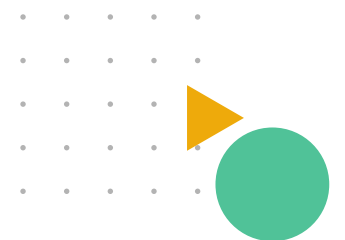
Account intelligence can fuel your sales engagement, management, and automation platforms including:



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.



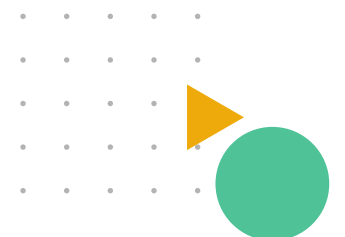
About BuzzBoard

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





BuzzBoard, Inc.

345 California St., Suite 600, San Francisco, CA 94104

www.buzzboard.com