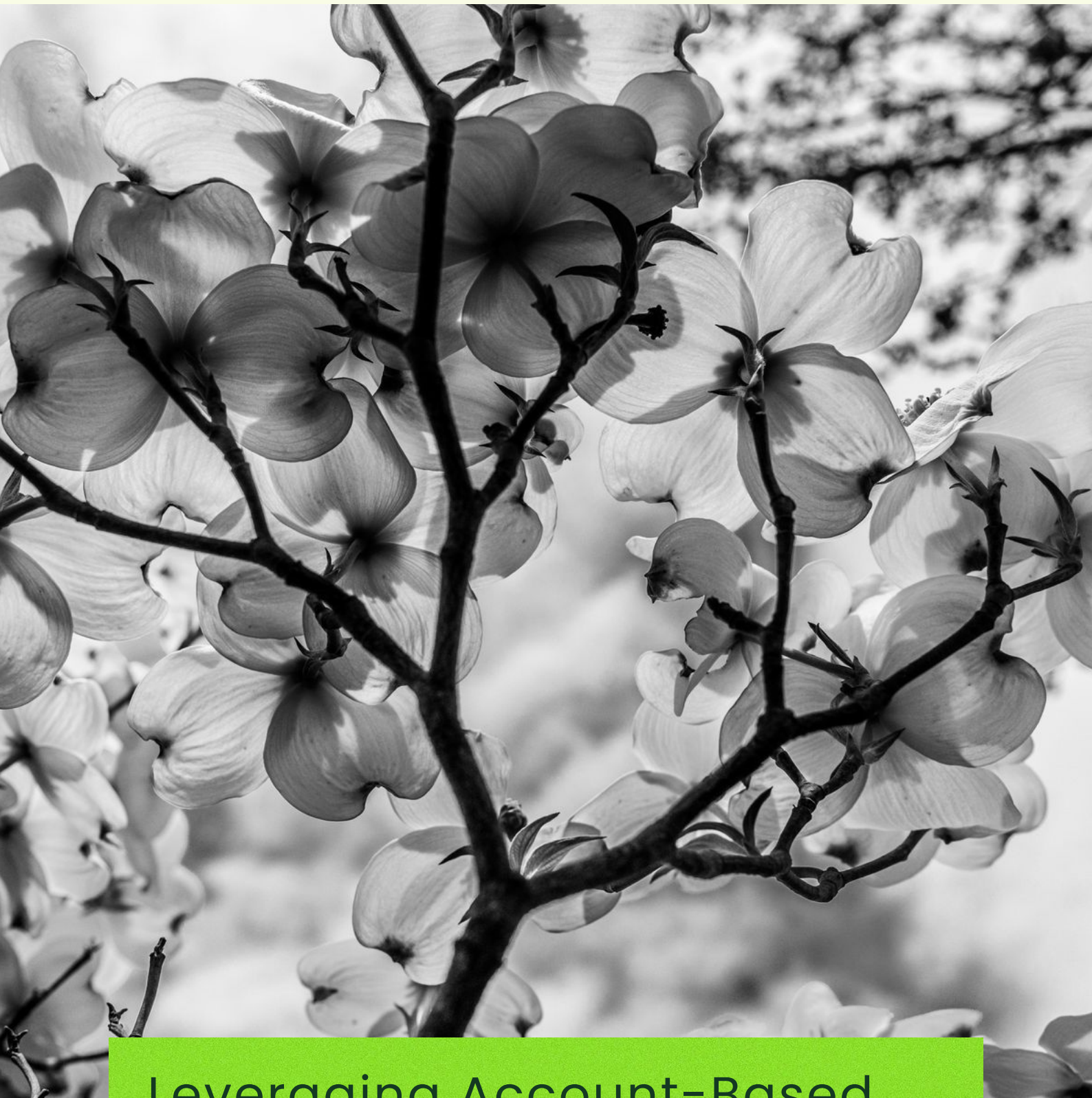




Leveraging Account-Based Marketing to transform client success



Focus on what counts

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Why this paper about ABM (Account-Based Marketing)?

Account-Based-Marketing can be a **game-changer in the financial industry**.

Despite its growing popularity, many asset managers and financial companies still grapple with fully implementing this strategic approach. At Grndworx, **we not only understand ABM but excel in getting results**.

Leveraging the recent addition of a renowned expert from the IT industry—who has successfully coordinated significant deals—we **are uniquely positioned to guide your organization through the nuances of ABM**.

Our team's **expertise ensures that we can tailor and execute ABM strategies that drive measurable results, enhancing client acquisition and retention** for asset managers and financial firms alike.

This paper is a high level introduction to ABM including a case study from asset management.

Join us as we explore **the transformative potential of Account-Based-Marketing** and discover how Grndworx can help your organisation **navigate this dynamic landscape with confidence and expertise**.

Introduction to Account-Based Marketing (ABM)

Account-Based-Marketing (ABM) has traditionally been a strategy predominantly utilised within the IT, IT-services, and consulting industries.

These sectors **often deal with high-value offerings, complex buying processes, and diverse buying centres.** Naturally, a marketing approach evolved that is **customer-centric and closely aligned with the buying process and sales teams.**

Initially designed to strategically win and grow individual accounts, ABM has evolved with the advent of sophisticated marketing technologies.

This evolution has **expanded its application beyond individual large account programs** to include strategies such as **1-to-few segments or even one-to-many**, often referred to as **'programmatic ABM'**.





Scalable technologies and growth of ABM

The growth of ABM is also driven by the availability of scalable technologies.

Marketers, especially those within the technology sector, have shown a greater appetite for experimentation and innovation enabled by these technologies.

However, **ABM's potential extends far beyond these traditional boundaries**, offering significant value in industries like finance.



Expanding ABM's potential

At Grndworx, we recognise the untapped potential of ABM for industries such as finance.

Our journey began with a strategic decision to collaborate with Dorothea Gosling, a renowned expert in ABM, to bring this powerful approach to our target audiences.

This partnership provides us with an experienced ABM practitioner with a proven track record of delivering tangible business results for global IT services companies, with or without sophisticated marketing technology stacks.



Dorothea's experience and global perspective enable her to successfully combine the **traditional** (European) **approach of strategic (1-to-1)** ABM with the **tech-led programmatic approach** – one-to-many, originating from the US.

Depending on our clients' needs, we leverage both strategic 1-1 and tech-led programmatic approaches.

By leveraging this strategic expertise, we exploit the **precision and personalisation inherent to ABM to accelerate growth and strengthen client relationships in the financial sector, where trust and tailored communication are paramount.**

2 DIFFERENT
APPROACHES:
1-TO-1 OR
1-TO-MANY

Establishing an ABM programme

Setting up an ABM programme requires **strategic vision, business acumen**, and the ability to **rally and activate a cross-functional team around a common cause**.

ABM spans all marketing disciplines, yet modern marketing environments often have specialised, disconnected siloes.

For ABM to succeed, **cross-functional collaboration is vital**. Processes need to be designed and tuned, and **some rules revisited**.

"Cross-functional collaboration is key to success."



Breaking up silos and enhancing collaboration

Failures in ABM initiatives often **stem from a lack of strategic alignment between sales and marketing, and between central and local marketing** teams, with leaders not jointly and actively promoting this new way of working.

Breaking down silos is key to success and requires **strong project management, stakeholder management, tenacity and leadership**.

Even with executive sponsorship, significant work is required to ensure success. **The benefits outweigh the effort.**



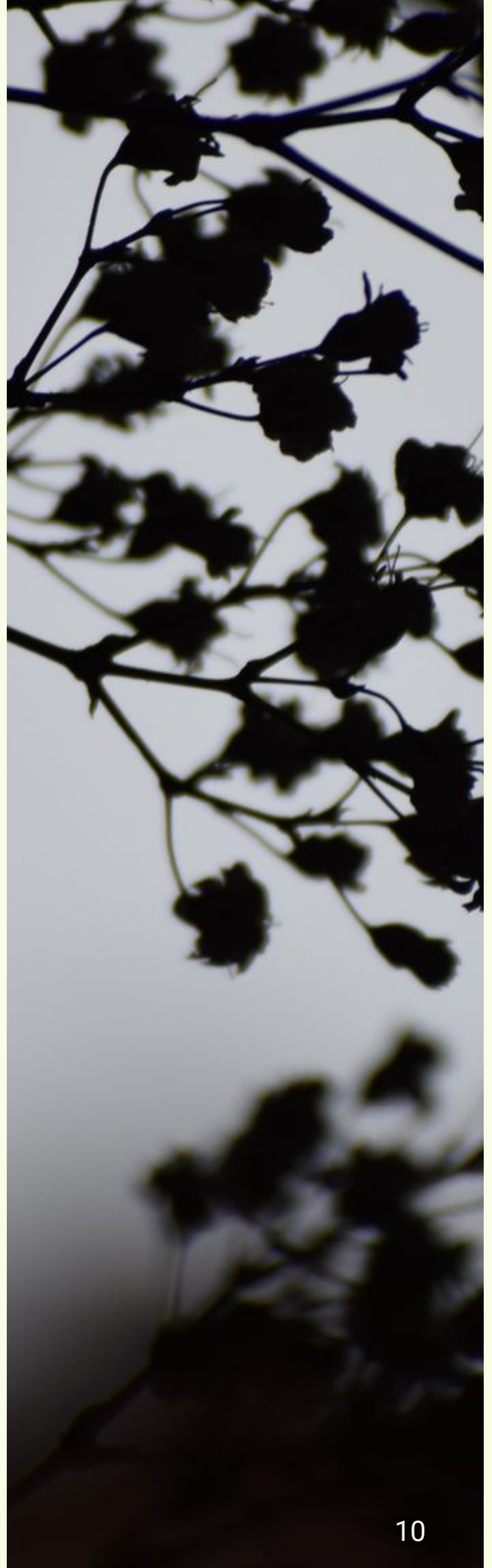
Focus on strategic business outcomes & customer-centricity

Demand generation teams, often the owners of much of the Martech stack, **may overemphasise volume metrics**, whereas **ABM focuses on strategic business outcomes**.

It may require convincing or **clear direction from executive sponsors to establish new rules with different, tightly aligned sales and marketing KPIs** in such an ecosystem.

Another common challenge is the lack of true customer-centricity in the established approaches to both sales and marketing. **Customer-centricity must be at the core of your ABM programme for it to be truly successful and account-based.**

As experienced practitioners, we help our clients overcome these and other challenges before they even arise.



Client Case Study

Asset Management



To enhance cooperation and accelerate growth, GrndWorX was asked to support the launch of a pilot Account-Based-Marketing (ABM) strategy, with a specific focus of driving growth and meeting the needs of asset management wholesale clients.

The strategy, aimed to **rebuild trust, reestablish the company as a dependable partner, and accelerate growth** with a trusted distribution partner.

The initiative started with a **comprehensive workshop to understand customer dynamics, challenges faced by sales, and expectations for renewed product promotion.**

The situation required the rebuilding of the relationship, following a period of challenging product performance and discontent of the client.

Focused social media and direct sales engagement

Following the workshop and based on the insights, a customer and audience-specific, joint sales and marketing campaign was designed that addressed the customers' objections and concerns.

This guided the **creation of tailored content**, including enhanced sales support materials, infographics, articles, personalised emails, localised brochures, and customised collateral for the client's sales and relationship managers.

Explanatory videos and targeted social media adverts addressed client concerns and promoted the focus products through targeted LinkedIn campaigns and direct sales force engagement.



Shift from silos to integrations

Challenges included the need for agility and speed, aligning resources across multiple teams, and optimising results over short time frames.

A key source of misalignment between marketing and sales was **the difference in key performance indicators (KPIs)** of the two teams. The new ABM approach, which focuses strongly on aligning around common KPIs and the rigorous monitoring and reporting on progress toward them laid the foundation for the required shift from a **siloeed way of working to a highly integrated and transparent approach.**



Positive outcome with sales results and better relationships

By adopting agile collaboration methodologies, regular stand-up meetings, and involving an external consultancy, the team ensured a free flow of information and rapid response to client's needs.

The outcome was overwhelmingly positive, with a significant turnaround in client trust. The Account-Based-Marketing program resulted in **substantial net new cash inflows** for consecutive fixed maturity product launches in late 2023 and early 2024, with the second launch **attracting over four times the initial investment amount.** The company's **reputation was improved**, internal client sales team **relationships were strengthened**, and a detailed assessment of regional attitudes and stronger opinions was conducted.

Marketing materials created for the sales team included product brochures, infographics, webinar scripts, and **personalised emails, with message testing and optimisation, regular campaign reporting, and insights shared with the sales team.**

Pilot success resulting in global roll-out

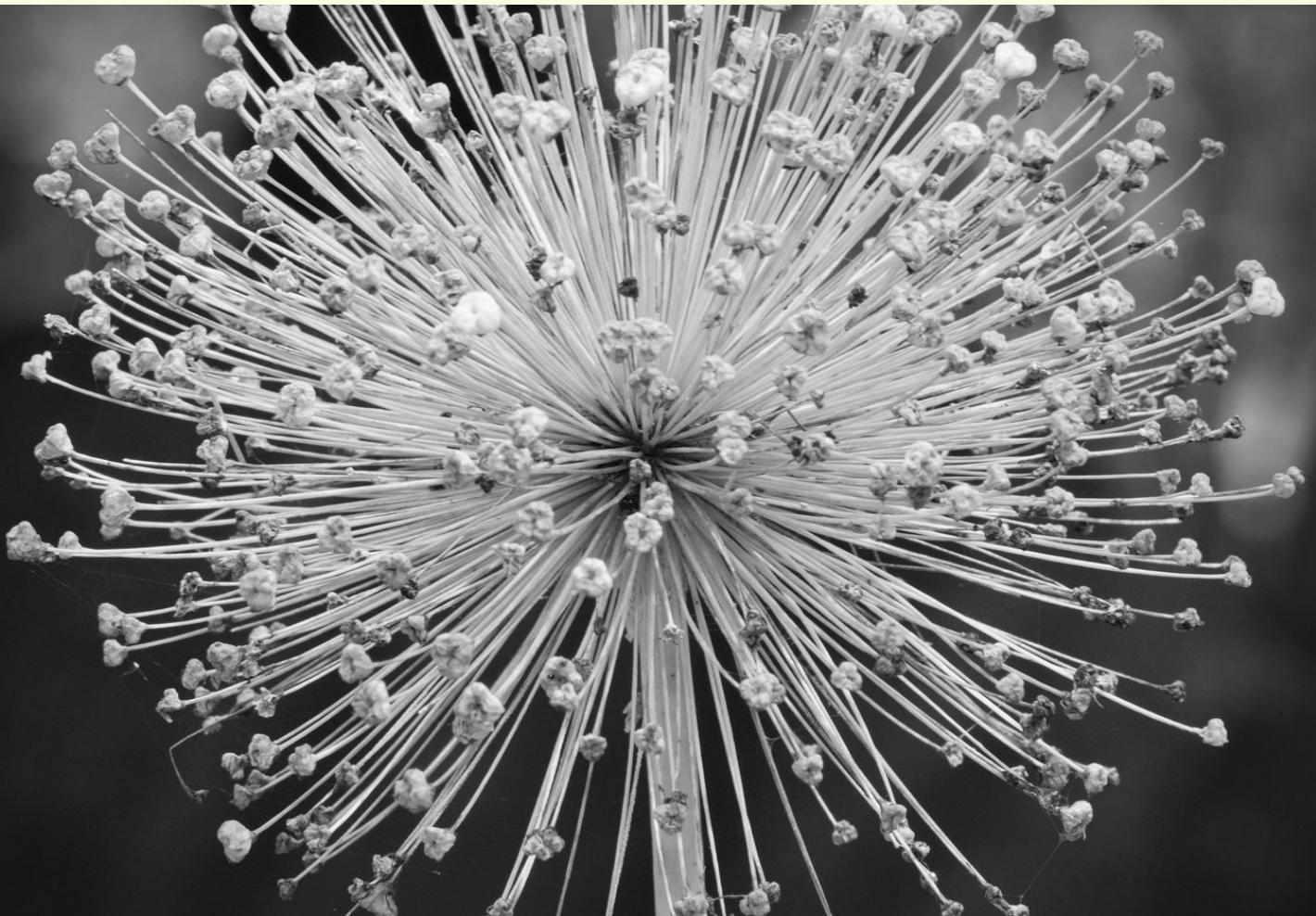
This pilot demonstrated the power of integrated marketing and sales efforts, delivering exceptional business results and restoring the company's relationships and reputation **with a strategically important customer.**

The ABM pilot has been recognised for its tangible business success, with plans to deploy and scale the approach across the global wholesale division.

The programme cemented the collaborative nature of the marketing and sales teams, driving customer-centric growth together.



Results & impact



Improved engagement
and alignment

The ABM client programs led to significant improvements in client engagement and alignment between sales and marketing teams, along with the anticipated increase in sales.

Client trust and confidence grew, demonstrating ABM's value beyond its traditional industries. We continue to support our clients, further rolling out ABM within their organisations.

Impactful & personalised growth strategies

By sharing our expertise and success stories, we **aim to inspire others to embrace ABM**, realising its potential to **create impactful, personalised marketing strategies** that drive growth and deepen client relationships.



We'd love to talk with you!



Dorothea Gosling

dorothea.gosling@grndworx.com

Patrick Ide

patrick.ide@grndworx.com



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Grndworx BV, Zeestraat 70, 2518AC Den Haag, The Netherlands

www.grndworx.com