



The Marketer's Guide to Identifying Decision-Making Units at Target Accounts

Everything you need to identify, target, and market to decision makers at your target companies.



The fundamental foundation of any successful B2B marketing strategy is to identify the right companies and the right people to reach within those companies.

In recent years, the evolution of this process has become known as the strategy of Account-Based Marketing (ABM), which provides a laser focus on who you are trying to sell to and helps organizations achieve better marketing and sales performance.

Matt Senatore of SiriusDecisions¹ says, “Account-based marketing is not a tactic, it’s not a technology, and it’s not a one-off program. It’s a change in mindset, and it’s a strategic discipline that allows us to take a prescriptive approach to the accounts that matter most in a way that increases relevance and specificity in our engagements.”

A SiriusDecisions report revealed 91 percent² of organizations found that they’re more likely to close a deal with an ABM approach than others.

However, you can’t take full advantage of your strategy if you have difficulty identifying and understanding your customer’s “decision-making unit.”

1 <https://www.siriusdecisions.com/blog/account-based-marketing>

2 <https://intelligentgrowth.siriusdecisions.com/studies/2017-state-of-abm-study-findings>

What is a Decision-Making Unit?

Decision-making units are the key stakeholders involved in the acquisition of a product or technology and are sometimes referred to as a buying center³ or Demand-Unit (SiriusDecisions specifically defines this group of individuals as a Demand-Unit⁴). This unit can range from one person to dozens, depending on your customer and the type of product or service that you are selling.

Understanding which personas are in your target account's decision-making unit can both help frame sales conversations to the pain points of the person you're speaking with, as well as empower marketers to craft impactful campaign messaging to not just the right company, but the right person(s) at that company.

The below guide walks you through what you need to know as a marketer to gain more insight into who the decision-making unit is, and what they're looking for during the buyer journey.

Identify What Makes a “Good Customer”

Look at your current client base. What characteristics do your “good customers” have in common? The answer to this question could range from the size of the company to their geographic location, so consider every factor carefully.

When you identify everything that's common to these accounts, you can develop a profile of this ideal customer. Once you have this data, it's time to search for leads that are close matches.

3 https://en.wikipedia.org/wiki/Buying_center

4 <https://www.siriusdecisions.com/blog/meetthenewestsiriusdecisionsdemandwaterfall>

Align Both Sales and Marketing to the Same Target Accounts

Your sales and marketing teams need to be aligned for a successful account-based marketing strategy.

Marketing knows the types of leads that the sales department is looking for and their tactics bring those companies in, but they need to be clear on the accounts to ensure they are investing money in the right areas. They create interest and awareness of the product, then nurture the leads with the right level of content and offers to get them engaged.

By the time the leads are ready to go to sales, they are qualified and ready to start moving forward. The sales team can lock them in and determine the right solutions for their needs. Engagement and conversion rates improve when sales and marketing are working together towards the same goal.

If you want to take this to the next level, you can use a tool like People.ai to show how sales are working the deals, who they are engaged with at the account, and what is happening at each stage of the sales pipeline. Using this level of sales opportunity insight, marketers can deliver compelling offers during and throughout the sales cycle and help ‘grease the funnel’ for the sales team.

Identify the Roles and Personas of These Target Accounts

As a marketer, you need to know two critical details about the contacts at your target accounts: their roles/titles, and the personas that must be involved at that company in order for the customer to make a purchase.

While titles may be identical between companies, a person's role and responsibilities might be drastically different. Sometimes the role titles will be significantly different, based on the company's size or structure, so try to define the typical deal persona so you can map each person to a standardized identifier.

Personas are a bit different. These dive into the pain points and behavior of each individual involved in the buying process. When you know more about the way that they think and handle decision-making, you can adapt your sales and marketing tactics to them accordingly.

Below are some example personas which might be in your target account's decision-making unit.



Examples of Key Stakeholder Personas Who Could Appear in a Decision-Making Unit:

- Primary Contact
- Champion
- Decision Maker
- Business User/End User
- Influencer
- Economic Buyer
- Veto Power

It takes some time to define a persona and role for everyone involved in the decision-making unit, but it's a necessary step to fully understand their thought process when they evaluate your products and services.

With insights from the People.ai platform, marketing and sales get a clear visualization of who they're speaking with at an opportunity and which roles could be in the decision-making unit. Using these insights, marketers are able to position and target their efforts and collateral to address that persona's role and pain points at the right stage of the sales opportunity.



Develop Targeted Sales and Marketing Campaigns

“Shotgun” style marketing tactics have no place in account-based marketing.

You have all the information you need to create highly relevant and personalized campaigns. Leverage this data and let everything from the retargeted ads to the content that you send speak to their specific situation and pain points.

You can also increase event attendance when you have clear insight into which prospects sales are working with and can invite those individuals.

Using insights from a tool like People.ai, marketers can design triggers and discover new contacts to market to based off of sales activities. Additionally, People.ai automatically captures and creates all contacts the sales team interacts with during the sales process which they would have normally never created (Example Use Case: Creating a contact record for an “End User” who was invited to an exploratory meeting, or an “Economic Buyer” who was cc’d on an email chain for early product buy-in).

The industry, company size, personas, product category, and every other detail can serve as a way to move the deal forward.

You can also select the most effective sales and marketing channels for each account. Some may respond better to direct mail or a private event, while others prefer to have a lot of resources sent through an email campaign. You can combine the ideal set of channels into an integrated marketing campaign that is perfectly designed to make them convert into a customer or to drive a repeat sale.

Strategies like these supercharge your marketing efforts and automation platform with highly accurate sales data and unlock net-new marketing opportunities.

Attribution and Measurement

How many target accounts did your marketing efforts influence last quarter? What's the return on investment of every dollar you put into a particular marketing campaign? If you aren't tracking and measuring attribution, you're essentially guessing with your marketing efforts and dollars.

Marketers need to take the time to create an attribution and measurement strategy in order to show their effort's impact on pipeline and revenue.

But how are marketers able to track activities at the opportunity level if the sales people aren't logging their activities under your campaign or the right opportunity?

What if a salesperson met a prospect at your conference and didn't add them to your opportunity? But later that person who learned about your company from a marketing event goes on to be a key decision maker in buying your product? Will the conference still receive attribution if the deal closes?

People.ai takes care of that automatically.

After automatically logging all of a salesperson's activities, People.ai uses cutting-edge AI technology to intelligently match those activities, and the contact they were associated with, to the right opportunity.

At People.ai, we know that sales doesn't happen in your CRM. There are a lot of sales activities that happen outside of your CRM (only about 40%⁵ of sales activities actually make it into the CRM), and even less of those activities and contacts get assigned to the right opportunity, which makes it difficult, and sometimes impossible to attribute marketing efforts to pipeline or closed won dollars.

Are you ready to start identifying and understanding the decision-making units that your sales and marketing teams are handling? This shift in mindset will empower your organization to get more out of the leads that come through your pipeline and help you close deals more effectively.

Final Thoughts

As marketing strategies become more advanced, so has the demand for an increased return on investment for every marketing dollar spent. Smart marketers are looking for every advantage they can find, including highly targeted ABM strategies as well as cutting-edge technologies like People.ai, to help them execute on those strategies.

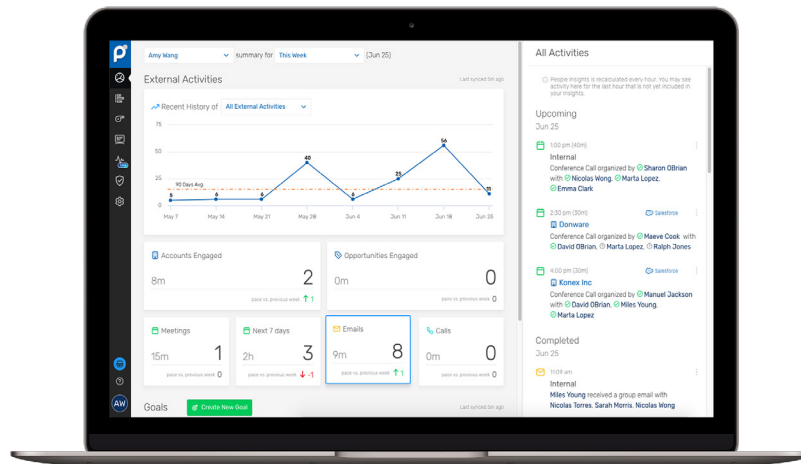
With the power of People.ai, marketers can produce profound insights and even predictive analytics to automatically identify and reveal prospect engagement, intent, and even sentiment.

If you're a marketer looking to gain a deep understanding of your customer's behavior throughout the sales funnel, schedule a demo of the People.ai solution. We'd love to chat.

5 <https://people.ai/product/>

The AI Platform for Data-Driven Sales and Marketing Teams

Automatically capture all sales activity to drive intelligent sales management and marketing insights



LEARN MORE

People.AI is the first intelligent platform to link people, activity, and engagement across the buying journey. People.ai captures all sales, marketing & customer success activity to drive actionable revenue insights across the buyer journey.

Companies like Lyft, VMware, Okta, F5, and Slack choose People.AI to automate contact creation, identify the right buying centers and model buyer behaviour to increase forecast accuracy, improve marketing effectiveness, and close deals faster.

Founded in 2016, People.ai is based in San Francisco and is backed by Y Combinator and Silicon Valley's top investors, including Lightspeed and a16z.

Learn more at [People.ai](https://people.ai) and follow us on Twitter at [@ppl_ai](https://twitter.com/ppl_ai)

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