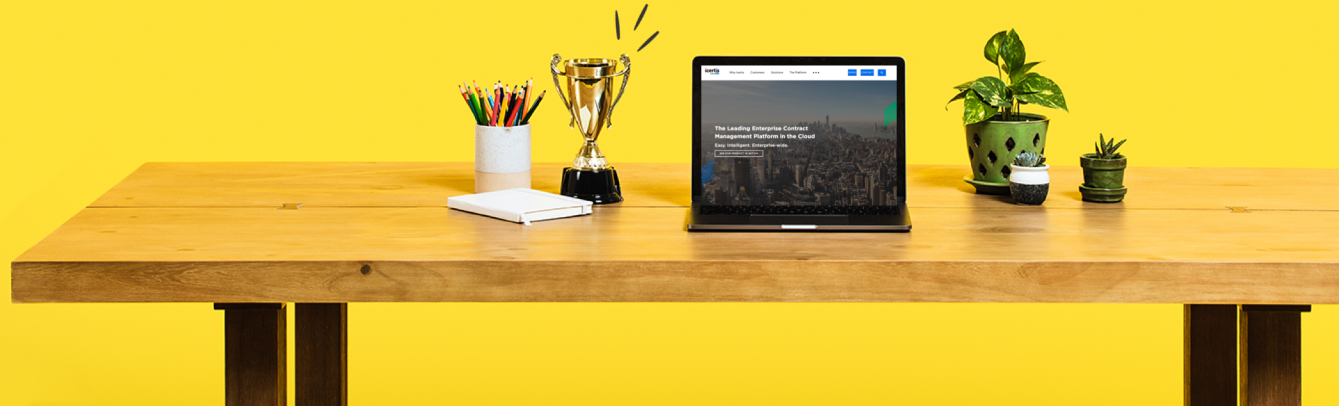# How Icertis built an ABM program that drove 13X ROI in just five months

RollWorks

Agenda

- Who we are and why we're on stage

- How Icertis built their account-based strategy

- How to uplevel your own account-based readiness

RollWorks

Your Speakers

Jennifer Toton
Vice President of Marketing
RollWorks

Interests—Passion for running, cycling, and swimming

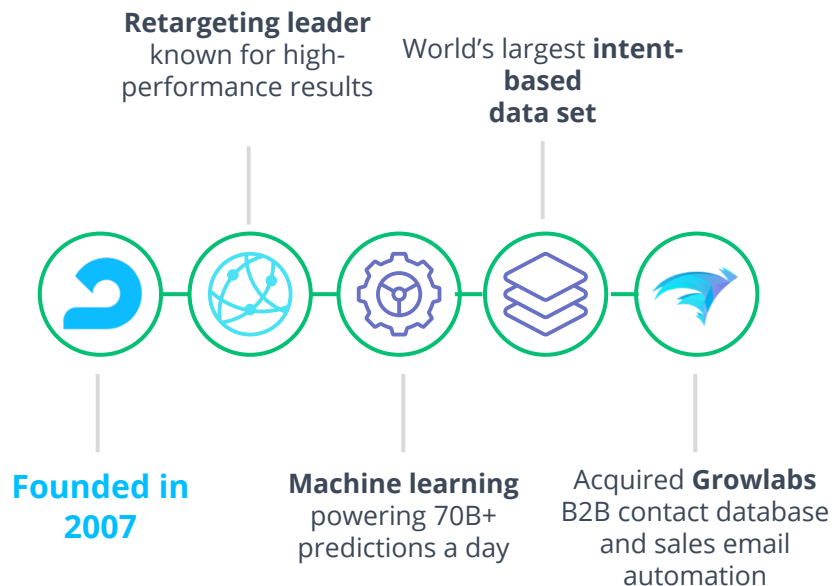**Chris Ries**
Senior Director of Demand Generation
Icertis

Interests—photography and cycling

RollWorks

What RollWorks is all about

RollWorks

RollWorks is built on AdRoll Group's proven technology

10+ years turning data into results

Retargeting leader known for high-performance results

World's largest **intent-based data set**

Founded in 2007

Machine learning powering 70B+ predictions a day

Acquired **Growlabs** B2B contact database and sales email automation

Ambitious companies trust RollWorks

IBM Cloud Video

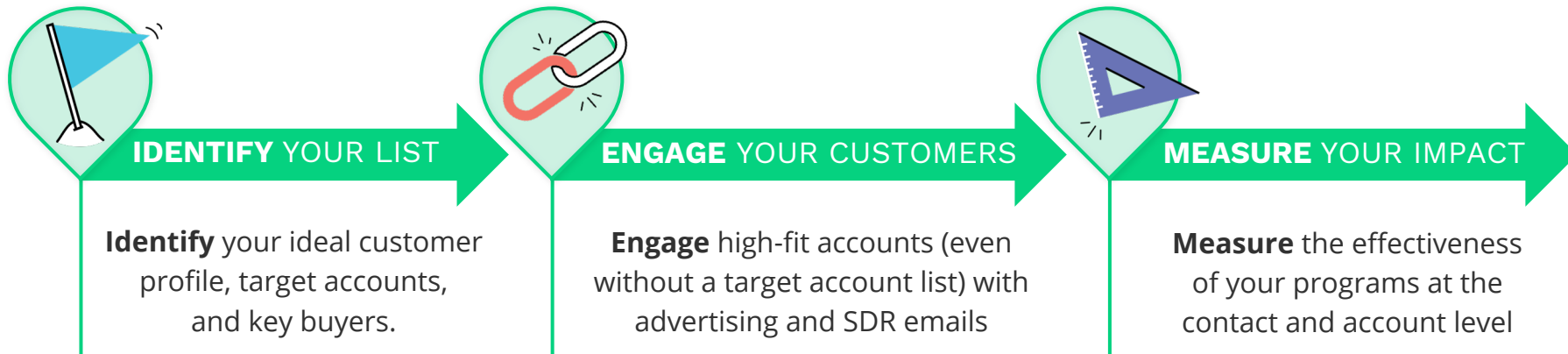ORACLE® + Dyn

PANTHEON

pagerduty

WP engine®

transpay

"We're thrilled with how RollWorks performs. As far as an investment it's a no-brainer. We consistently see a positive ROI both in revenue and in leads."

—John Wright, Digital Optimization Manager ORACLE® + Dyn

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RollWorks Account-Based Platform

IDENTIFY YOUR LIST

ENGAGE YOUR CUSTOMERS

MEASURE YOUR IMPACT

Identify your ideal customer profile, target accounts, and key buyers.

Engage high-fit accounts (even without a target account list) with advertising and SDR emails

Measure the effectiveness of your programs at the contact and account level

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Icertis Overview

Enterprise Contract Management

Buy-Side Contracts

Corporate Contracts

Sell-Side Contracts

Icertis solves the hardest contract management problems on the easiest to use platform

icertis
Applied Cloud

Icertis is the recognized analyst leader for CLM

FORRESTER®

Download the full Forrester 2019 CLM report *here*

2019 FORRESTER CLM LEADER

- The ICM platform received the highest score possible (5.0) in 17 out of 22 current offering criteria – more than any other vendor in the Forrester evaluation.

- *"Its contract creation, contract repository, contract approval, contract fulfillment tracking, importing of existing and third-party contracts, and support for both buy-side and sell-contracts continue to be outstanding,"*

- *"Icertis has continued to improve its CLM product since it ranked as a Leader in our 2016 Forrester Wave and has acquired a series of Fortune 100 clients as a result"*

TRUSTED BY INDUSTRY ANALYSTS

Gartner®
Vendor to Watch

"The kind of comprehensive contract management solution needed by modern businesses."

Spend Matters SolutionMap VALIDATED 2019

"Undisputed CLM leader"

Leader SPRING 2019

Highest score among enterprise customers

icertis
Applied Cloud

Icertis at a glance

Founded 2009

12 Offices Worldwide

2 Development Centers

3 Support Centers

800+ Employees

5.7 Million Contracts Managed

GeekWire 2018 Deal of the Year

Seattle Business Magazine Top 10 Washington Companies to Work For

Map labels: SEATTLE, SILICON VALLEY, NEW YORK/NEW JERSEY, LONDON, PARIS, FRANKFURT, STUTTGART, ZURICH, SOFIA, PUNE, SINGAPORE, SYDNEY

Trusted by the world's top companies

AUTOMOTIVE/TRANSPORTATION
DAIMLER
KANSAS CITY SOUTHERN Lines
AIRBUS

PHARMA/HEALTHCARE
Johnson&Johnson
SANOFI
abbvie

TECHNOLOGY/TELECOM
Microsoft
Adobe
airtel

CONSULTING/SERVICES
Cognizant
World Wide Technology
wipro

MANUFACTURING/DISTRIBUTION
BASF
3M
Rheem

RETAIL/CONSUMER
Neiman Marcus
TREASURY WINE ESTATES
A&E

BANKING/FINANCE/INSURANCE
Humana
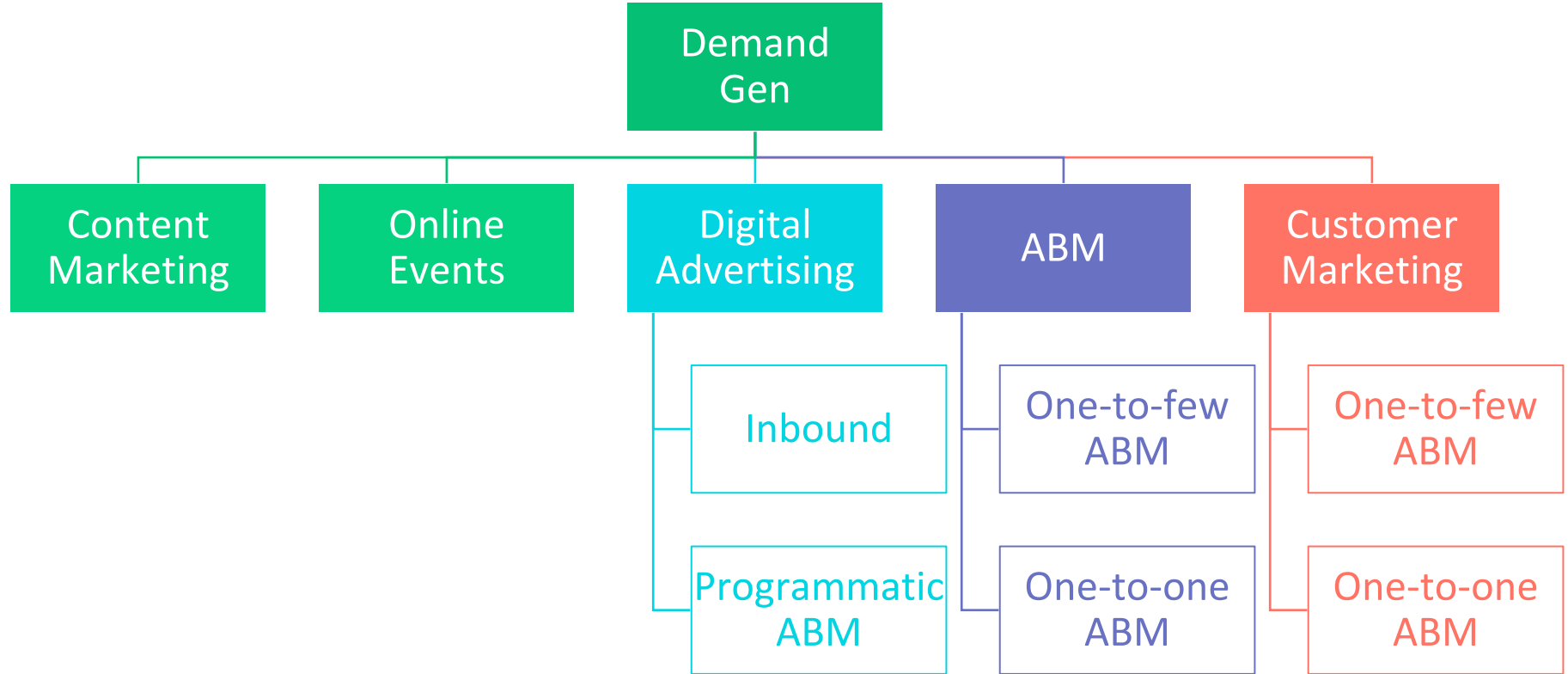wex
BlueCross BlueShield

ENERGY/ENGINEERING
MODEC
ABB
ENBRIDGE

5.7 Million
Contracts

40+
Languages

90+
Countries

icertis
Applied Cloud

Getting started with ABM at Icertis

Structuring the demand gen team for success

Demand Gen
- Content Marketing
- Online Events
- Digital Advertising
  - Inbound
  - Programmatic ABM
- ABM
  - One-to-few ABM
  - One-to-one ABM
- Customer Marketing
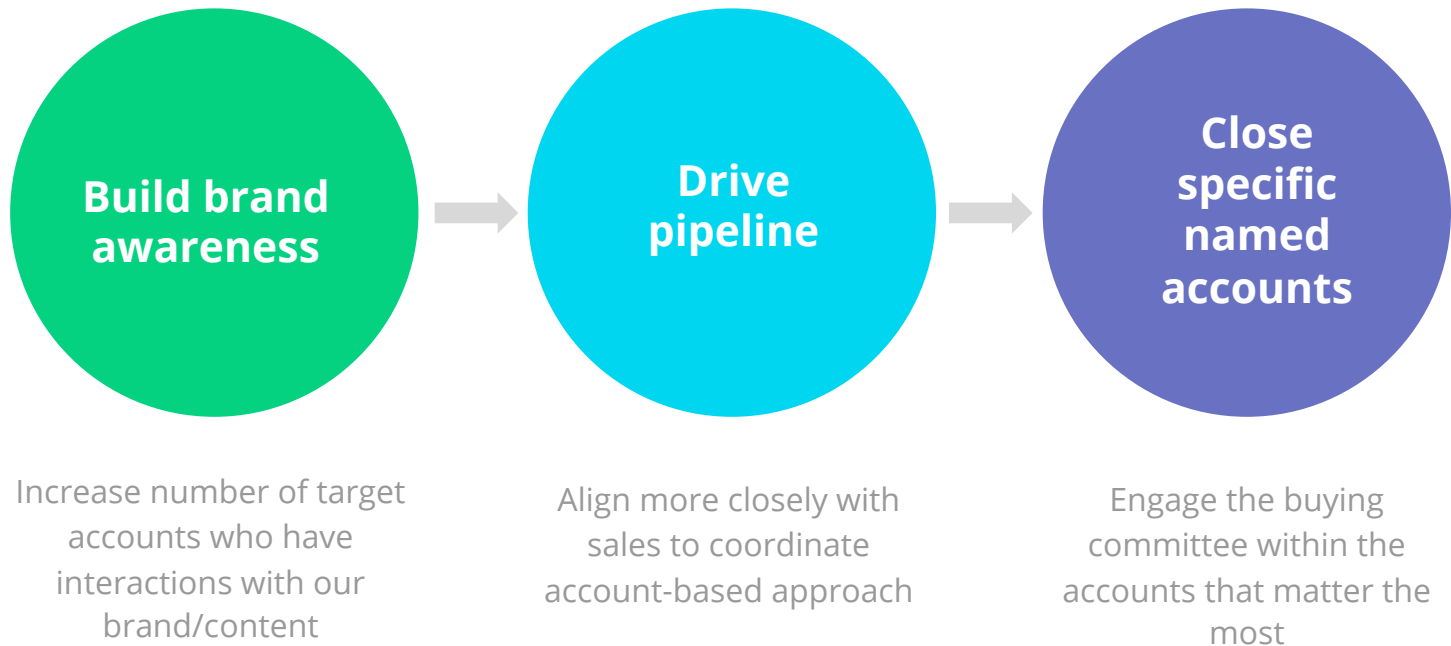 - One-to-few ABM
  - One-to-one ABM

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"We really do think of ourselves as the world's most sales-focused marketing team. It's great to be able to provide sales with data-backed insights that show they're going after the right accounts."

– Seth Nesbitt, CMO, Icertis

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What we're trying to achieve

Build brand awareness

Drive pipeline

Close specific named accounts

Increase number of target accounts who have interactions with our brand/content

Align more closely with sales to coordinate account-based approach

Engage the buying committee within the accounts that matter the most

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Our core ABM tech stack

How we chose an account-based platform

Which ABM vendor should we choose?

- Third party research
- Demos
- References

Requirements:

- ✓ Clear price quotes, ability to allocate budget by attributes
- ✓ Seamless integration with Salesforce
- ✓ Ad placement across channels and devices that target Salesforce contacts
- ✓ Ad personalization using CRM fields
- ✓ Great account management and product teams

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Why RollWorks became critical to our ABM strategy

Global programmatic display ads

One-to-few campaigns

One-to-one display campaigns

Month 1   Month 2   Month 3   Month 4   Month 5   Month 6   Month 7

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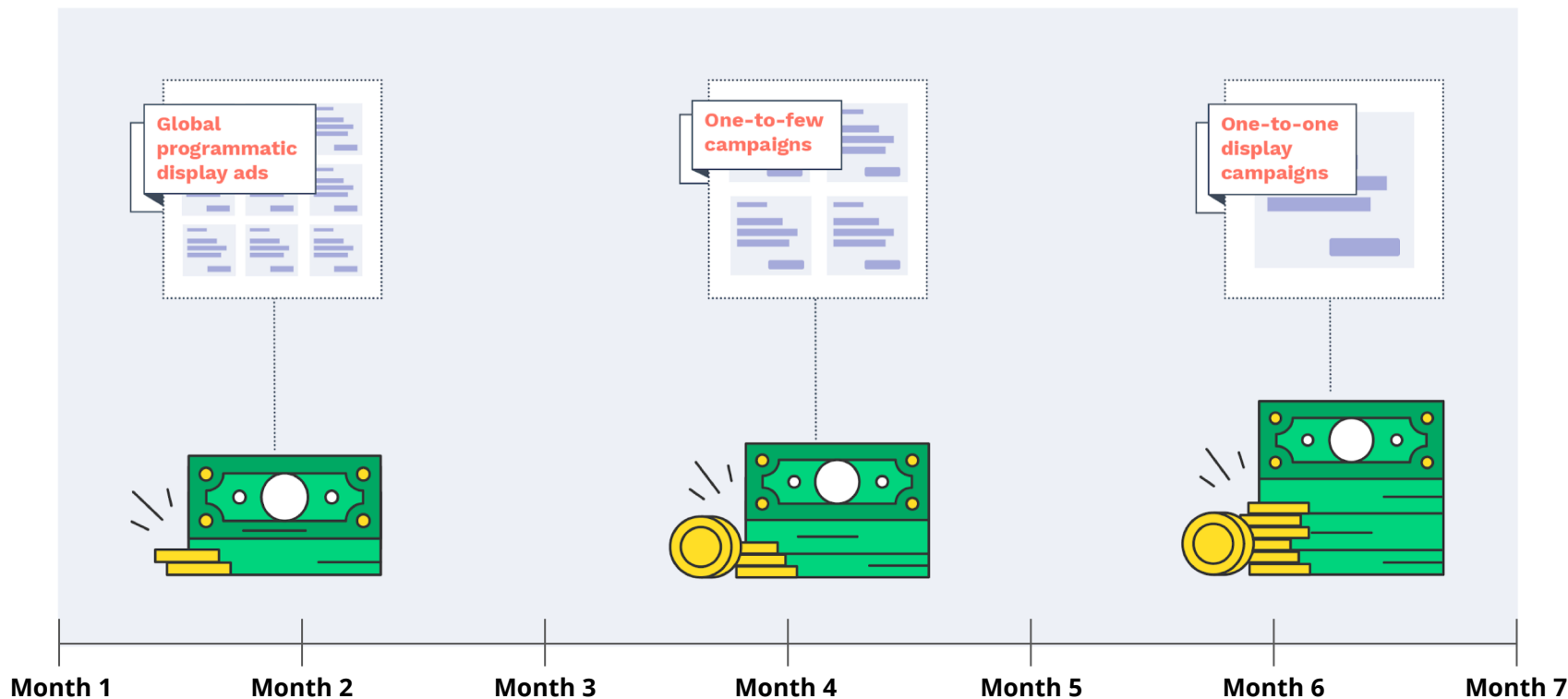
Building the account-based program at Icertis

Four ingredients for success

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1. Building your target account list in close alignment with sales

Determine ICP

Sales

Mktg

Prioritize list to build TAL

1700 accounts

Filters include B2B enterprises from eight key verticals based on company size

Alignment around a certain number of target accounts

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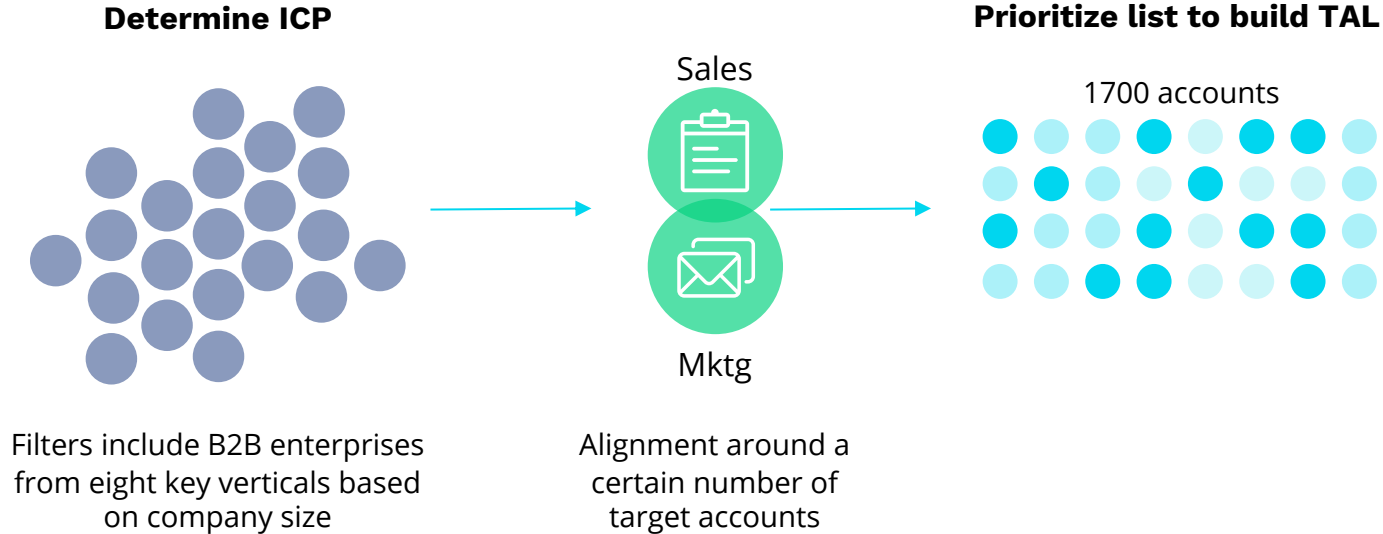
2. Driving awareness and engagement among target accounts by delivering highly-personalized digital ads

Programmatic campaigns

Target: Persona + Industry
Goal: Engagement to form fill

LANDING PAGE
(gated)

One-to-few campaign (airlines)

Target: Persona + Industry + Pain points
Goal: Engagement to form fill

LANDING PAGE
(gated)
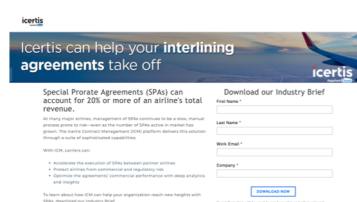
One-to-one campaign (Bristol-Myers Squibb)

Target: Persona + Company + Pain Points
Goal: Increased engagement

UBERFLIP STREAM
(ungated)

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3. Measuring success and effectively communicating wins to leadership

Awareness	%	The percentage of target accounts who have had interactions with our brand/content
Account engagement	%	The percentage of accounts that are meaningfully engaged with our company
TAL targeting	%	The percentage of leads/contacts sourced from target accounts
MQAs	%	The percentage of marketing qualified accounts from your target account list
Opportunity influence	%	The percentage of opportunities influenced through marketing campaigns
Target account pipeline	$	The value of pipeline created with target accounts in a given period of time
Bookings or revenue	$	The value of closed-won deals with target accounts in a given period of time

Three successes achieved by RollWorks:

1. 80% of target accounts are aware of Icertis

2. 13X ROI in revenue

3. 70x ROI in sales pipeline

We also now have an **influence report** that shows us the reach and clicks that are influencing opportunities in the pipeline.

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How our new reporting helps w/ ABM measurement

How our new reporting helps w/ ABM measurement

How our new reporting helps w/ ABM measurement

Key takeaways

SHARED ABM VISION

Work closely with your sales & exec team to build a shared ABM vision, including goals and strategy

PLAN BEFORE YOU BUILD

Plan your display ad campaign architecture before building in RollWorks

PERSONALIZE YOUR ADS

Personalize your ads by industry, persona, funnel stage, or account-specific messaging to increase click through rates

INVEST IN ATTRIBUTION

Invest in multi-touch attribution capabilities to validate influence

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Where are you today and where do you want to go?

	★ **EXPLORING**	★★ **DEVELOPING**	★★★ **OPTIMIZING**	★★★★ **MARKET-LEADING**
TARGET ACCOUNTS	• Developing an ICP	• Refining ICP	• Tiered Target Account List	• Target Account List rotations
RESOURCES	• *Pilot* • Begin building team • % of digital/demand budget	• Leadership sponsors • Small budget	• Consistent feedback loop • Dedicated budget	• Scaling across segments • Significant budget
EXECUTION	• Marketing provides air-cover	• Marketing & SDR orchestration	• Marketing, SDR, & sales running well orchestrated plans	• Velocity & expansion sales plays • Increasingly personalized
MEASUREMENT	• Campaign performance • MQLs within ICP	• Account engagement within ICP	• Detailed target account pipeline	• Aggregated target account engagement scores

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Thank you!

Any questions?

chris.ries@icertis.com / linkedin.com/in/christopherries/

jennifer.toton@rollworks.com / linkedin.com/in/jennifertoton

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How our new reporting helps w/ ABM measurement

ENGAGE

MARKETING
- Ad Campaigns
- Ads

SALES
- Sales Automation
- Tasks
- Automation Settings

Channel: All | Type: All | Status: Running | Campaigns: All | 21 Campaign | Columns | View Charts | Export

Off/On	Name		Spend	Impressions	Clicks	Conversions	CTR	Video Cor
	6 Total		$6,300.71	3,485,465	6,519	2.0	0.19%	
⬤	Q2 Test: TREATMENT TAL Campaign, No ...		$3,150.58	1,692,187	2,718	0.0	0.16%	
⬤	RW Q32019 "GOLD" Accounts - DMs only...		$231.68	111,713	338	2.0	0.30%	
⬤	RW Q32019 "PLATINUM" Accounts - DM ...		$576.06	254,473	535	0.0	0.21%	
⬤	RW Q32019 "GOLD" Accounts - DM Only ...		$2,014.94	1,293,369	2,630	0.0	0.20%	
⬤	RW Q32019 "PLATINUM" Domains, Site ...		$41.02	1,523	30	0.0	2.0%	
⬤	Q2 Test: TREATMENT TAL Campaign, Sit...		$286.43	132,200	268	0.0	0.20%	

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How our new reporting helps w/ ABM measurement

How our new reporting helps w/ ABM measurement

MEASURE

MARKETING

📊 Campaign Analytics

📢 Attribution

SALES

📢 Sales Reports

Campaign Analytics   **RollWorks Impact**   Scheduled Reports

Overview ›

Account Based Lift Metrics ⓘ

Sun, Jul 7, 2019–Mon, Aug 5, 2019   Last 30 Days ▾

Campaigns: 2 ▾   🔍 Search   17 Accounts

50 rows ▾   « ‹   1–17 of 17   › »   Columns ▾   Export

Account	Unique Visitors Lift %	Avg. Per Day Unique Visitors Lift ▾	Page Views Lift %	Avg. Per Day Page Views Lift
Total	+208%	+0.787	+287%	+1.29
bill.com	+45%	+0.124	+103%	+0.355
wondersauce.com	Net New	+0.0667	Net New	+0.0667
redguard.com	Net New	+0.0667	Net New	+0.0667

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