

ACCOUNT BASED EVERYTHING FOR REVOPS

The ABX guide created specifically for revenue operations



Table of Contents

ABM vs ABX	3
Why ABX?	4
Account Based Everything	4
ABX Strategy	6
Unification of marketing, sales and customer success	6
Clear rules of engagement	7
Change management	8
Planning and Process	9
Technology	10
Updating your CRM and workflows	10
Lead to account matching	11
Account assignment	13
ABX for RevOps	15

There's a lot of ABM content for marketing teams. A lot. If you want tips on creating ABM content, targeting the right accounts, running ad campaigns, or qualifying leads, you'll have your choice among hundreds of blog posts and ebooks.

But what about ABM content for the rest of the revenue organization? We've moved beyond earlier marketing-driven ABM models to a more comprehensive company-wide view of ABX. Everyone on a customer-facing or customer-adjacent team plays a part in the new world of ABX. So let's talk about what ABX means to the entire revenue organization, especially on the operational side of things.

ABM vs ABX

First, let's discuss nomenclature. For years, we've called it "account based marketing" or ABM. But more recently, more and more people are using the ABX acronym. What's the difference?

Account based marketing (ABM) refers to high-level coordination between marketing and sales to gain or grow customers at the account level (and not the individual contact or lead level). With ABM, the idea is that the highest value B2B customers are companies, and to keep and grow a customer, you need to win an entire account, not just one or two people who work there. Historically, ABM was run out of the marketing department, and emphasized a more focused lead generation effort on a small group of target customers.

Account based experience (ABX), on the other hand, is essentially just a more modern way of referring to the same concept, that intentionally incorporates a full customer lifecycle view of an account - from marketing to sales and customer success and everything in between. It's *account based everything*. Some people even use the ABE acronym. ABE/ABX takes a systems view of the revenue organization, and relies on true alignment and coordination between teams.

ABM has never really been just about marketing, which is why many companies use the more inclusive ABX and ABE acronyms. We'll use ABX throughout this document, because we believe it's philosophically more aligned to our view of the customer lifecycle. We'll talk a lot more about that in the following pages.

Why ABX?

There are myriad reasons a company might move to an ABX model, but for many, they transition because the customer demands it. B2B buying has changed dramatically over the past 5-10 years. The typical B2B buyer comprises multiple stakeholders - at least 4 people, often up to 10 or more. It's a complex sales process, with more buying interactions before a deal closes, buyers finding information everywhere (and definitely not just from the vendor), and multiple competitors involved in most deals. These changes in buying complexity mean companies need smarter, more sophisticated ways to sell. Enter ABX. (If you're interested in more on B2B buying trends, read this from [Forrester](#) and [Gartner](#)).

Let's compare ABX to a more traditional transactional approach. In a transactional model, your job is to convince someone to purchase a product or service within a single sales cycle. You either win or you lose. ABX takes a broader view. You know which businesses should be your customers, so you engage them over time - often over multiple sales cycles. You tailor your messages to different folks within the account (the executives, the decision makers, the influencers) to ultimately build broad-based support for your solution. If you lose an individual sales cycle, you derive information you can use in future sales cycles. For example, the account's under contract with a competitor for the next 6 months, they just hired a new leader who's going to look at this issue in Q1, or the team is just too small right now to deal with this issue. That information makes your next outreach even better, even more targeted and, at some point, even more successful. To use a sports metaphor, the transactional model is about winning an individual game, while ABM is about winning the championship over the course of a season.

This all sounds great; who doesn't want to win championships? But there's just one problem. Reps can't talk to accounts. They talk to people. So when somebody goes to your website and fills out a lead form, you just need to assign that lead to a rep to go call them, right? If only it were so simple.

Account Based Everything

Gartner has a useful operational definition of ABX. Here are [Gartner's](#) five attributes that define account based everything:

1. Targeted, high-value accounts
2. Data and intelligence-driven programs/campaigns

3. Orchestration across marketing, sales development, sales and customer support
4. Valuable and personalized buyer experiences
5. Coordinated, high-frequency/effort outreach

We've created a [similar framework for thinking about ABX](#), particular for companies making the transition from a lead-based GTM motion to a more account-based one.

1. Accounts should be your focus, not leads.
2. Clear rules of engagement are essential.
3. Your CRM and workflows will need some updates.
4. Change management will help.
5. Marketing, sales and customer success need to be in lock step.

There are a few similarities across both frameworks, concepts that are both foundational to ABX and important for revenue operations. Let's dig in.

Strategy. An effective ABX motion requires alignment between *all* customer-facing teams. There may be new specialized roles and there will definitely be new processes, both of which require careful change management. You'll likely need to develop a new playbook for your rules of engagement that define how customers flow through your organization, and how teams work together for the best results.

Planning and process. If you've historically structured your sales organization around leads or patches, you'll have a lot of work to do on account distribution. That will require orchestration in plays across teams, coordination in outreach and timing, new SLAs, and so on.

Technology. Naturally, new sales processes mean new sales technology. You may need to replace or add to your revenue tech stack to include more modern software for ABX management, like lead routing, account assignment, or sales process automation.

ABX Strategy

Unification of marketing, sales and customer success

Transitioning to a full ABX model means everyone in your revenue organization actually needs to work together. An account is a long-term commitment. From the moment an account learns about your company (marketing), to when they come in for a demo (new business), to when they have questions about the product a year later (customer success), there will be many touch points with your team. That means everyone needs to be on the same page - with messaging, with rules of engagement, with expectations, with communication.

So we shouldn't just be talking about *alignment* - we should be talking about *unification*.

Because "sales and marketing alignment" really just focuses on where your company draws its particular lines. For example, who qualifies inbound leads - does that team report into a sales leader or a marketing leader? Who determines the qualification criteria? How can sales and marketing work together to conceive a better qualification process?

But the questions should be bigger (and more strategic) than that. It shouldn't be just about who - it should be about what, why and how. What are our company's lead qualification criteria? Why is one kind of lead better than another? How can we focus on higher-quality leads?

Unification in an effective revenue organization probably has many of these elements:

- Collaboration from conception
- Mutual understanding of and respect for process
- Regular, inclusive communication
- Focus on enablement
- Unified tech and reporting
- Shared objectives
- Universally beneficial incentives

Clear rules of engagement

An ABX strategy relies on clear, comprehensive rules of engagement. You need to be sure you've codified who owns which accounts and when, who engages with which contacts and when, what to do in case of conflict, and more. When you're dealing with accounts as the main unit of ownership, you're bound to run into conflicts because a contact wasn't matched to the correct account, or a rep misunderstood an account's ownership. Starting off with good RoE can help, but know you'll likely need to improve your rules as you go. Communicate that with your team.

What are some of the challenges you may encounter with your rules of engagement?

Deal complexity. If your company has complex deal parameters, like channel partners, accounts with parents and/or subsidiaries, or multiple product lines, it inevitably leads to more RoE conflict. Who takes ownership of a parent company if one of their subsidiaries is already a customer? What happens when a rep who is tasked with selling Product A learns a prospect is talking to another rep about Product B? How do you handle inbound prospects from partners? The more complex your deal profile is, the more likely you are to run into RoE issues.

Data, or lack thereof. Effective RoE relies on clean data and a tidy CRM. It means you need enough information about a prospect to know how to assign it - things like company industry, revenue, employee count, location, and more. It also means your CRM really has to be the single source of truth in your organization, and that everyone keeps opportunity data up-to-date. A lot of RoE challenges begin as data quality issues before turning into a full-blown conflict.

Market segments. How well defined are your territories or market segments? It can be hard to account for every possible market segment. Even if you're dealing with geographic territories, how do you distribute those evenly among reps? Finding the right market segmentation - one that both is and feels fair - is hard. Further, you likely have to tweak this regularly, causing confusion about who's supposed to work which segment.

Attribution, especially as it relates to marketing. Attribution requires accurate lead-to-account matching to be sure inbound leads are always matched to existing accounts when appropriate. It also means you need clear rules about who gets credit when an outbound rep is working a deal that also inbounds around the same time. How do you keep your inbound and outbound efforts in sync?

Dishonest rep behavior. It's not common, but it happens, especially in larger organizations; sometimes reps will deliberately break the rules to get to the better deals. That includes things like:

- Reps hoarding lost or quiet opportunities, or changing opp dates to hold onto them longer than the normal ownership time. These are the Rick Astleys of your sales team (because they're never gonna give a deal up).
- "Salesforce surfers," which is what one revenue leader calls reps who try to attach themselves to a deal in progress for partial credit. You may also recognize these reps as fairweather fans, low-hanging fruit pickers, and the like.
- Reps changing account names or other data to hide an account or make it look like an account should be in their territory even when it's not.
- Reps who work a deal through to close, and then discover a "mistake" in the data that meant that deal never should have been theirs. They should get credit since they worked it though, right? Right?!

These challenges are compounded if reps perceive scarcity in deal flow, if there are issues of trust on your sales team, if your company is growing quickly, if you have a highly competitive environment, if there's rep turnover. So many factors can contribute to RoE conflict that it's no wonder it's so complicated.

These challenges are a good starting point if you want to make sure your RoE are robust enough to stand up to a transition to ABX. You should also work through these updates with stakeholders from all teams - ops, marketing, sales and customer success to be sure you're capturing all scenarios and edge cases. Think about how this will impact both outbound and inbound, if you need to make any changes to your qualification process, and if you need to update headcount.

If you need help refreshing your rules of engagement, we've developed a free toolkit that helps with RoE planning and documentation. You can [access it here](#).

Change management

If your organization has been depending on leads for a while, this will be a big change. Don't underestimate the importance of involving your teams early, and using change management best practices as you roll out your new strategy.

Prepare training, Q&A sessions, feedback channels, and whatever else you need to ensure your teams a) know what's going on and what to expect, b) have an opportunity to provide feedback, and c) get the enablement they need to be successful.

Be sure everything is documented where everyone can access it. Communicate multiple times about what's changing and why. And if there will be any changes to compensation, pay extra attention to how you communicate those changes. People are sensitive to anything that feels like it could mess with their paychecks (which is why so many of the above RoE challenges come up when they do), so treat these matters with appropriate care and clarity.

Planning and Process

Accounts should be the focus of your organization, not leads. This may sound obvious, but it's the first step in an ABX strategy.

A lead isn't something you just work to close a deal. A lead is a signal that tells you one very important thing: there is interest in your solution at a particular account. The individual signaling interest matters, but less than you think.

Here's why. People rarely go rummage around vendor websites requesting demos or filling out contact forms for fun. A more likely scenario is that this request is the result of some internal discussion. During that discussion someone got assigned the task of looking for a solution to a business problem. And guess what? It's highly unlikely the person who got assigned that task is a decision maker except at very small companies or for very small purchases. This results in a bit of upside down logic: the lead is an incredible buying signal for the account but the individual associated with the lead is likely only tangentially relevant to successfully converting that account to a customer.

You resolve this conundrum by working the account, not the lead. When you get inbound interest, you assign the interested account to a rep so they can work that account, starting with the person that inbounded and then working out from there. It might sound like a small change in mindset but the impact is large. If you change your perspective on inbounds such that you don't "work a lead" but you instead "work an account that's signaling interest," a lot of things become clear.

This may require a big shift in how your team thinks, how your processes work, even how your CRM is set up. It will likely impact compensation, as well.

Is your marketing team measured on generating leads? What about your outbound team? How does your organization define "leads" in this case? Consider moving to a model where you're measuring SAOs (sales accepted opportunities), demo sets or closed-won revenue. There are a number of models that may make sense for your organization that aren't based solely on the leads you bring in.

Technology

Now it's time to talk about some of the technical considerations in moving to ABX.

Updating your CRM and workflows

You'll have to update your CRM workflows, maybe change how certain objects are handled, etc... This could be a heavy lift for your ops team, so plan accordingly.

You may need to update how you handle assignments, for example. You may need to change your round robin logic, or uplevel your matching rules. Will these changes impact your SLAs in any way? If you have to send new inbounds through more steps, does that take longer to get a new contact in the hands of a rep?

What tools will be affected by these changes? Think about all your sales and marketing tech stack, like marketing automation, chatbots, CRM, sales engagement, routing, and more. Do you have the tools you need? Your marketing operations team may also choose to add an account based marketing platform to automate ABX programs at scale.

Regardless of the exact technologies you implement, there are a few key considerations that will underpin how all your systems communicate with each other, and the way they interact with your CRM. Your CRM likely is — and should be the center of your revenue organization — and your other sales and marketing technologies must integrate with it. So as you think about adding or updating your existing tech stack, plan carefully for how your CRM processes are impacted. What changes do you need to make to your CRM?

There are a hundred ways these changes will be implemented in your sales organization - like using automation for lead routing and account assignment. Even if you've got a relatively simple sales motion right now, you're probably automating the assignment of new leads coming from marketing to your sales people. (And this applies to account

assignment further into the customer lifecycle as well.) ABM relies on automated routing and assignment.

Something as simple as routing leads can actually be quite complex, though. You need robust and flexible assignment rules. You also need to think about how to match new leads to accounts in your CRM.

Lead to account matching

How do you know a new lead is actually new? What can you do to ensure you're matching leads to the right accounts - whether those accounts are new or existing? How can you prevent duplicate account creation?

Treat leads as the account buying signal they are and immediately convert them (or relate them) with accounts. Then make sure those accounts are what get assigned. When a new email address comes in at the top of your funnel - whether it's from an inbound or outbound motion - you need to make sure it's not associated with an existing account before you do anything else.

One of the biggest issues in lead routing is duplicate accounts. Messy CRM data contributes to sales collisions, process delays, and even lost revenue. You need to be able to quickly match new leads to accounts and route them to the right sales rep. So how do you actually implement lead-to-account matching?

It can be easy to overcomplicate the matching process. Let's talk about how not to.

Start by focusing on the customer's web domain. Most of your B2B prospects and customers have websites. And since web domains have to be unique, let's start by considering web domains as the universal identifier for an account. This can apply to an account through a company's website, as well as associating an individual lead or contact with a company via their email address.

So, the foundation of your lead-to-account matching should start by connecting the email address of a lead or contact to the web domain of an account. That means having the cleanest customer data you can, which starts with your inbound lead generation processes, and depends on good CRM hygiene throughout the customer lifecycle, from lead routing on.

How do you ensure clean data in your CRM? Follow these six steps.

1. **Ask for a work email address.** As much as possible, restrict inbound lead generation to require company email addresses and avoid public webmail addresses (e.g., gmail, yahoo, etc..). If a lead isn't interested in sharing their work email address, that could be a sign that they're not a good fit for your team. They're not truly interested in your product, or they're not a real business. You may also consider asking for a company website on inbound lead forms.
2. **Require a web domain for every account in your CRM.** Ensure that a website is specified for every new account in your CRM using data validation rules. If you can't require it, perform regular audits to ensure that they get populated. Reinforce the importance of including a website in all accounts with your team.
3. **Normalize domains.** One challenge with website fields in CRMs is that they're often populated with information in all kinds of formats (e.g., with and without http/https, any information after a / or ?). Add some code in your CRM to extract just the domain part of the URL (e.g., "https://website.com/blog" becomes just "website.com") or email address (e.g., "jess@realcompany.com" becomes "realcompany.com") and store it in a custom field on the lead and the account. Some data enrichment tools can automatically do this for you.
4. **Clean up subdomains.** It's generally a good idea to remove subdomains when doing normalization, especially "www" (e.g., "www.example.com" becomes "example.com"). But this can lead to problems with some hosted subdomains (e.g., realcompany.squarespace.com or mystore.shopify.com). When in doubt, only suppress common subdomains like "www" to keep it simple.
5. **Incorporate domain aliases.** Many companies have more than one web domain. This includes scenarios like:
 - Simple aliases (salesforce.com and salesforce.org)
 - Regional domains (salesforce.com and salesforce.uk)
 - Subsidiaries (salesforce.com and tableau.com)
 - Speciality sites (salesforce.com and appexchange.com)
 - Acquisitions (salesforce.com and exacttarget.com)
 - Name changes (rypple.com and work.com)

6. **Make every website domain unique.** Use duplicate detection rules in your CRM to ensure new accounts aren't created with the same domain as an existing account.

With clean customer data, you can use your existing ABM, marketing automation, CRM, and other tools in your sales tech stack to match the domain associated with a lead to the domain associated with an account. If there's a match, you can associate the new lead with the existing account. If there's no match, you can create a new account and associate the new lead with that. From there, you can assign ownership of the account to a rep based on your account assignment rules.

Account matching doesn't have to be overly complicated. Using web domains as your universal account identifier will cover most of your account matching issues and keep your CRM account assignment cleaner and simpler. If there are any remaining issues, you should be able to update those manually, since there should be very few exceptions.

Account assignment

We typically start thinking about assignments in terms of territories and customer segmentation. When your team is small, individual territories and segments are usually synonymous with an individual. As you scale, you typically move beyond one territory or segment owner to a team of reps responsible for a particular segment. This leads to a new problem: once you've figured out a segment, which rep should get a given account?

That's easy, you say... we'll just hand them out equally, round robin style. This is a good start, but in practice it gets hairy quickly. What about the rep that hoards opps and has way more accounts in their name than everyone else? What about the rep that was on vacation and lost a week of assignments? What about the rep that's just not performing who just got assigned the best lead to come in in ages?

In our experience, everyone's simple round robin usually becomes a weighted round robin (to give some people more turns in the queue) with some kind of manual order adjustment (to give a rep another turn) and some level of capacity balancing (to not overload any given rep). These advanced round robin techniques can get complicated!

These challenges result in a very common pattern - because of the nature of a typical sales funnel, there are fewer assignments to perform at each stage the further you go down the customer lifecycle. However, each of those assignments is typically more valuable because it represents an opportunity that's farther along in the funnel, closer to closing. This inversion of volume and value means organizations typically implement

automations at the top of the funnel and then rely on manual assignment later in the funnel because they feel like it's safer. Many companies automate inbound lead routing, but very few automate opportunity or new customer assignments.

While understandable, this approach has big drawbacks.

First, it means that assignment processes are inconsistent. Automation forces you to clearly specify your rules while a manual process allows significantly more human error (or judgment calls) to enter into the process which will produce varying results.

Second, you typically give up data integrity and audit capabilities in the manual process. Looking up "who's next" in a report or a spreadsheet and then flipping their ownership in Salesforce means you don't have a single source of truth for what exactly happened when. That makes it hard to answer the inevitable question about why one rep got an assignment and another didn't.

Finally, manual processes don't scale. If you don't plan to increase the volume of deals in your funnel, then don't worry about this one. If you're in the process of scaling now, you should really be thinking about how that manual spreadsheet is going to work when you have 2x the number of SAOs being assigned by 2x the number of BDRS to 2x the number of AEs, or 3x the number of customers to 2x the onboarding reps and so on.

So with all these issues, what should an organization do?

- **Think holistically.** Don't just think about lead routing, setting demo appointments for AEs, etc in silos. They're all instances of the same basic problem. Try to solve them in similar ways. One specific situation that causes problems is doing lead routing in your Marketing Automation platform and all other assignments in your CRM. We recommend implementing all of it in CRM - this at least keeps your logic in one place.
- **Maintain an audit trail.** You're 100% guaranteed to have times where you need to explain why a particular assignment was made and to review the chain of ownership of a particular item. Make sure that whatever you do, you maintain an audit trail. If you use Salesforce, at a minimum you should turn field history tracking on for assignment-related fields.
- **Automate.** Even if it's easy to use a spreadsheet now, it'll lead to inconsistencies now and it'll get harder in the future. Salesforce offers great tools like Flow to help

you automate all kinds of tasks. This forces you to be explicit about your rules and helps drive consistent results.

- **Learn from others.** While round robin assignment eventually turns into something more complex, you can get started with a basic version fairly easily. If you're using Salesforce, we've got an [overview of all the ways to actually implement round robin assignment in Salesforce](#).

When your organization gets to the point that you have a) leads coming in on a regular basis and b) multiple sales reps, you quickly realize you need a way to divide up those leads among your reps. If you're using Salesforce, you may have noticed a built-in feature called Lead Assignment Rules. We've created technical documentation to walk you through [setting up Lead Assignment rules in Salesforce here](#).

ABX for RevOps

Hopefully by this point, we've convinced you that ABX is about a lot more than marketing. Revenue operations will play a big role in planning, rolling out, and maintaining a company's ABX program. This guide can help. And Gradient Works can help unify your account routing and distribution across teams. Want to see it in action?

**Unify your company's ABX program
with agile, flexible account
routing and assignment**

Get a demo