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# A CMO'S GUIDE TO BUYING AN ABM PLATFORM

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Overviews, Insider Insights, and Capabilities and Cost Comparisons for 5 Top Platforms

THE ADVANCED BUSINESS METRICS AGENCY

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# A CMO's Guide to Buying an ABM Platform

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## **CMOs who want to execute or update their ABM program are in luck.**

The resounding success of account-based marketing strategies has created a competitive and maturing ABM-platform market — there are plenty of high-quality options to choose from.

Having so many options, however, can make it tough to find the best match. It's not easy to find and compare platform capabilities to make a truly informed decision, and several platforms claim to be #1. While it could be tempting to skip the research and go with your gut, that approach could impact your

results and, ultimately, your ROI. To get to the right decision, it's worth a deeper dive.

Might an ABM platform fill your current gaps but create new problems? Could integrations or reporting not measure up? Will it scale when you need it to? And will the costs match your expectations?

## Let's find out.



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# What You Need Out of an ABM Platform

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## The Power and (Perhaps)

### Counterintuitive Value of 1:1 ABM:

Your ABM platform should make it easy to identify the right accounts and serve them the right information and messaging at the right stage of the funnel. Platforms that run 1:1 campaigns are optimal because they enable hyper-targeting and hyper-personalization, which leads to improved engagement, relationships, and loyalty with prospective customers. They're also assumed to be the most expensive because they require the most effort and human resources to run.

Every CMO invests in an ABM platform for the roughly the same reason: to generate more revenue at the best ROI. To make your investment pay off, the platform you choose should excel at these six key pieces of an omnichannel campaign:

- 1. Targeting**
- 2. Digital channels including programmatic**
- 3. Integration capabilities**
- 4. Site personalization**
- 5. 1:Few & 1:1 capabilities**
- 6. Reporting and analytics**

To determine the cost and returns of running your program on a particular platform, be prepared to have multiple conversations with platform representatives or consult an agency with experience using the platform.

Also, keep in mind that ABM platforms are not DIY solutions. They are built for marketing and technology professionals who are comfortable maneuvering within the com-



plexities of an ABM tech stack and leveraging the data they produce to drive sales.

Or do they?

While running personalized campaigns costs more on the front end, the investment pays off. In fact, the resources you need to run 1:few campaigns, sometimes called ABM Lite, can be equal to those of run 1:1 campaigns. While running ABM Lite enables you to scale efficiently and target entire buying committees with consistent messaging, this less granular approach usually delivers a less impressive ROI for the same or a similar investment.



## Top ABM Platforms: Pros, Cons, and What To Expect



We have chosen the five ABM platforms below because they are all proven solutions with a strong market presence, shine in specific areas, and deliver results.

They also have some significant differences that can be difficult to identify—in particular, the ability to run 1:1 and 1:few ABM, the availability of account-level and title-level reporting, integration with existing systems, the maximum number of named accounts, and the number of people required to run the platform.

**The overviews and insights in the following summaries are designed to help you decide which platform might be the best fit for your company.**

The tables that follow the summaries compare the five platforms based on the key pieces of an omnichannel campaign noted above. **The Comparing Platform Capabilities Table** presents a head-to-head capabilities comparison and the **Comparing Platform Pricing Table** shows the relative



## Platform Agnostic



The Advanced Business Metrics (ABM) Agency runs all of the platforms presented in this white paper. Our team is platform agnostic.

We are account-based marketing and demand generation specialists with decades of B2B digital marketing experience. We partner with larger companies and enterprises to plan, run, and manage their omnichannel campaigns for optimal efficiency, visibility, and ROI. Our goal is to solve our clients' challenges, which begins by helping them choose and use whichever ABM platform best meets their needs—sometimes, it's as straightforward as fully utilizing the platform they're already using.



### 6Sense

6Sense is a top-rated market leader that offers an all-in-one solution. Since its inception, it has invested heavily in proprietary predictive intelligence, AI, machine learning, and other technologies—it's a data-focused platform that strives to provide account insights not available elsewhere and enable seamless orchestration for a more successful engagement stack. The company has a solid growth plan and will likely continue to be a major player in the ABM space.

#### Pros

- Proprietary intent network with deep account insights and scoring
- Pre-built integrations with industry-leading engagement solutions and an open API
- AI-driven predictive insights into journey stages
- Embedded account-level CDP
- Behavioral and predictive data on account records within CRM

6Sense may be a good fit for your company if you want to capitalize on its predictive intelligence and lead-scoring technology and permanently migrate all of your ABM vendors to a single solution. Customers like its ease-of-use

and the ability to integrate with other ABM software, and internal teams report they get help when they need it. 6Sense primarily targets professional and business services and the financial and technology industries. It is enterprise-ready.

#### What Makes It Shine

Identifying in-market accounts

#### Cons

6Sense may not be a good fit for your company if you're looking for 1:1 and 1:few campaign capabilities. While it offers site personalization and content hubs, it doesn't offer a granular approach. Some reviewers have been disappointed with the quality of the leads when compared to other software, and you may find it cumbersome to drill down on the high-level overview data provided.

#### What To Expect

- Ability To Run 1:1 and 1:few: No
- Account-Level Reporting: Yes
- Title-Level Reporting: No
- Integration with existing systems: Y
- Number of people required to run it: 6
- Contract/Commitment type: 1 Year

[See comparison tables.](#)

## About

### 6Sense

**Year founded:** 2013

**Location:** San Francisco

**Number of employees:** 251-500  
(source: Crunchbase)

**Key customers:** Agile, Dell, Mediafly

**Prominent marketing message:**  
Know Everything So You Can Do Anything



*"I love that with 6Sense, I can easily look at my accounts and prioritize who is considering, purchasing, making a decision on my software. I love that I can set alerts to see if there are companies searching for our solutions, competitors offerings, or other keywords. Overall, this tool is amazing for territory action planning + prioritizing which accounts to prospect throughout the quarter. I could never live without 6Sense again!"*

— **Capterra Review, Jamie N, Enterprise Account Executive, Mid-Market (51-1000 emp.)**



**Triblio**

Triblio is a growing ABM platform that provides centralized, account-based engagement across multiple channels. It focuses on personalization, account-based advertising, and sales activation features that run on a proprietary AI-powered intent engine. Triblio was acquired by IDG Communications in 2020, which extended its global reach and ability to support enterprise customers.

**Pros**

- Account-based advertising tying into more than 100 ad networks
- Web personalization includes 1:1 landing pages, banners, chat messages, more
- Sales activation module to unify sales and marketing goals
- Smart Score proprietary AI-based algorithms for live account and single-user scoring
- Account visibility with granular detail

Triblio may be a good fit for your company if you want 1:1 and 1: few capabilities, strong data insights and analytics, and the ability to personalize engagement directly from the dashboard. It’s a growing company with a smaller market presence than other platforms but its smaller size and positioning may lend itself to more flexibility and higher-touch

customer support—users praise its customer service. Tech companies are Triblio’s primary target industry and it’s enterprise-ready.

**What Makes It Shine**

Ability to scale

**Cons**

Triblio may not be a good fit for your company if you want robust account profiling or data management capabilities. You may also have difficulty running the platform in-house if you don’t have the right tech specialists. Some users have struggled with its layered and somewhat opaque structure that makes it difficult to understand in advance that certain capabilities are add-ons, dependent on one another, and require additional people to run.

**What To Expect**

- Ability To Run 1:1 and 1:few: Yes
- Account-Level Reporting: Yes
- Title-Level Reporting: No
- Integration with existing systems: Yes (Salesforce)
- Max number of named accounts: 10,000
- Number of people required to run it: 6
- Contract/Commitment type: 1 Year

[See comparison tables.](#)

**About**

**Triblio**

**Year founded:** 2013

**Location:** Reston, Virginia

**Number of employees:** 11-50  
(source: Crunchbase)

**Key customers:** JDA, Atos, and Nasdaq

**Prominent marketing message:**  
Reach, engage, impact your pipeline for 1 to 10,000 accounts.



*“Great platform for B2B info tech services. Fairly friendly and flexible, excellent metrics. Having two experienced service and support people at hand is invaluable, as they provide the heavy lifting in getting campaigns off the ground. The Triblio team participates in internal integration meetings to ensure web and CRM teams understand the benefits and tech.”*  
— G2 review, Dawn H., Mid-Market (51-1000 emp.)

# DEMANDBASE

## Demandbase

Demandbase is a comprehensive ABM solution with a very large market presence that continues to grow. Prior to 2020, the platform stood out for leveraging third-party intent data for account-based advertising. After acquiring Engagio, an ABM platform specializing in marketing automation and CRM, the company rebranded its primary offering as DemandBase One, reflecting its new positioning as an end-to-end platform that coordinates marketing and sales.

## Pros

- Expanded capabilities focus on delivering a unified go-to-market suite
- Combine first- and third-party data into a holistic UI
- Proprietary B2B DSP for account and buying-committee focus
- AI identifies in-market accounts and optimizes ad bids
- Four distinct clouds work together (ABX, Advertising, Sales Intelligence, and Data) with the ability to buy data separately for your existing systems

Demandbase may be a good fit for your company if you want to use an all-in-one platform with a strong account-based advertising history and high levels of personalization, including 1:1, 1:few, and site personalization. It integrates with partner software companies to

customize your tech stack and provides a list of outsourced services for integration expertise. Users especially like the account-level insights. Demandbase is enterprise-ready and primarily targets the financial services, healthcare, life sciences, tech, and manufacturing industries.

## What Makes It Shine

Unified sales and marketing

## Cons

Demandbase may not be a good fit for your company if you want to handle some areas of campaign management (including list management) in-house or are looking for strong predictive scoring or reporting that's easily customizable. The ecosystem includes a set of strategic partnerships and integrations that may or may not work with your current tech stack or unique situation.

## What To Expect

- Ability To Run 1:1 and 1:few: Yes
- Account-Level Reporting: Yes
- Title-Level Reporting: Yes
- Integration with existing systems: Yes
- Max number of named accounts: 2500
- Number of people required to run it: 6
- Contract/Commitment type: 1 year
- Contract/Commitment type: 1 Year

[See comparison tables.](#)

# About

## Demandbase

**Year founded:** 2006

**Location:** San Francisco

**Number of employees:** 251-500  
(source: Crunchbase)

**Key customers:** Accenture, Panasonic, Adobe

**Prominent marketing message:**  
Move as one team, seamlessly sharing data, insights, and results.



*“In earlier roles, I had used both Engagio and Demandbase to plan and execute ABM programs. I would use Engagio predominantly for reporting and Demandbase for building account lists, website personalization, and targeted ads. I’d use both platforms for account prioritization. What I love best is that I now only have to access one platform for all of my planning, executing, and reporting of ABM programs.”*

**—G2 review Alyssa D. Senior Manager/Demand Generation, Enterprise (> 1000 emp.)**





**Terminus**

Terminus is a full-featured ABM platform with a large market presence and aggressive vision, fueled in part by being the evangelist behind FlipMyFunnel, the ABM conference that’s grown into a B2B community and podcast. Terminus has acquired several companies while building out its platform to include full-funnel analytics, email ads, chat, and account intelligence.

**Pros**

- Includes Bombora intent topics and integrates with G2
- Solid integration with leading CRMs, MAPs, and other tools
- Data Studio for a unified view of account data
- Hybrid approach to ad targeting combines cookies and IP identification for better match rates
- Robust analytics and customizable reporting

Terminus may be a good fit for your company if you want an ABM-centric approach without having to go all-in on a platform with proprietary-only capabilities. The platform focuses on enabling your various teams—marketing, outbound, sales, and customer support—to work in tandem and manage LinkedIn, retargeting, automation, and email cam-

paings within the platform. It also offers more initial visibility into its features, plan levels, and integrations than other platforms. Terminus primarily targets the tech industry and is enterprise-ready.

**What Makes It Shine**

Integrations

**Cons**

Terminus may not be a good fit for your company if you’re looking for 1:1 or 1:few or ease-of-use out of the box. Some users have noted Terminus could make improvements to its (perhaps overly) simplified interface, dashboard data consistency, and ease of creating new campaigns. While Terminus is transparent with what’s included in its plans, determining the plan level or bundle that’s the right match for you may be confusing.

**What To Expect**

- Ability To Run 1:1 and 1:few: 1:1 in email advertising only
- Account-Level Reporting: Yes
- Title-Level Reporting: Yes
- Integration with existing systems: Yes
- Max number of named accounts: 500
- Number of people required to run it: 3
- Contract/Commitment type: Yearly

[See comparison tables.](#)

**About**

**Terminus**

**Year founded:** 2014

**Location:** Atlanta

**Number of employees:** 101-250  
(source: Crunchbase)

**Key customers:** DHL, G2, Outreach

**Prominent marketing message:**

We Power High-Performing Go-to-Market Teams™



*“The platform’s ease of use as you perform tactics is great. Being able to retarget, run a role-based experience, and so much more. The integrations they have with G2 intent, Bombora, and others adds another layer of detail with the intent that we value. I love the ability to use omnichannel interactions so this isn’t just an ad platform. Running a cohesive campaign with email banners, chat, and ads is much more powerful.”*

**—G2 review, James G, CMO, Mid-Market (51-1000 emp.)**



### RollWorks

Rollworks is a growing platform that seeks to bring the power of ABM to companies of every size. Its three delineated solutions—identification, engagement, and measurement—simplify ABM conceptually, as does its tiered pricing structure. As a division of NextRoll, which began as a retargeting company in 2007, RollWorks launched in 2017 to enable customers to leverage its data set and predictive models, then added capabilities by acquiring Growlabs and flexibility by building out its partner ecosystem.

#### Pros

- Machine-learning to identify ideal customer profile (ICP), accounts, key buyers, account intent, and scoring
- Robust capabilities for account-based ads, personalized ads, and retargeting
- Bidirectional syncing for Salesforce, Marketo, and Hubspot with reporting both within the RollWorks dashboard and CRMs and MAPs
- Partner ecosystem includes less common integrations like direct mail and gifting
- Personalized, automated sales emails

Rollworks may be a good fit for your company if you're looking for strong account selection and advertising capabilities (especially retargeting), tools and features that let you start small or

go all-in with ABM, and bidirectional information syncing with CRMs and MAPs. Users often praise RollWorks for its LinkedIn API, granular reporting, and customer support. SMBs will like the low-cost starting point. Tech companies and services are primary RollWorks customers.

#### What Makes It Shine

ABM democratization

#### Cons

RollWorks might not be a good fit for your company if you're looking for hundreds or thousands of account lists —RollWorks maxes out at eight. Large companies and enterprises may find the platform limiting in other ways when compared to more established ABM platforms. Some users mention tech glitches following platform updates and the need for support when trying to customize reporting in the dashboard.

#### What To Expect

- Ability To Run 1:1 and 1:few: No
- Account-Level Reporting: Yes
- Title-Level Reporting: Yes
- Integration with existing systems: Yes
- Max number of named accounts: 8
- Number of people required to run it: 6
- Contract/Commitment type: Minimum Spend

[See comparison tables.](#)

## About

### RollWorks

**Year founded:** 2017

**Location:** San Francisco

**Number of employees:** 50-100  
(source: Crunchbase)

**Key customers:** Blackbaud, Personify, Dialpad

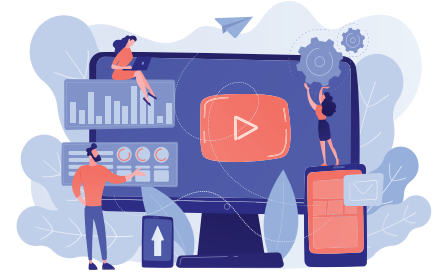
#### Prominent marketing message:

Leveling the playing field for ambitious B2B companies



*“We are using RollWorks for multiple marketing programs (retargeting, intent data, etc.) and have a direct sync with our HubSpot account. The platform is easy to use and allows us to target our ABM lists, which is a massive part of our marketing strategy. We’ve also really been able to dive into the intent data and action off of it, which has proven fruitful for our team. I had limited ABM experience before using RollWorks, but our Account Manager has made it so easy to not only get up to speed but also diving into performance and ways we can optimize our accounts/targeting.”*

**—G2 review, Mid-Market (51-1000 emp.)**



# Comparing Platform Capabilities

Does the platform cover the six key pieces of an omnichannel campaign required for omnichannel ABM?

	Targeting	Digital channels	Integrations	Programmatic	Site Personalization	Content Syndication
6Sense	MEETS	MEETS	MEETS	MEETS	MEETS	NO
Triblio	EXCEEDS	MEETS	MEETS	MEETS	MEETS	NO
Demandbase	EXCEEDS	MEETS	MEETS	MEETS	MEETS	NO
Terminus	MEETS	MEETS	EXCEEDS	MEETS	NO	NO
RollWorks	MEETS	MEETS	MEETS	MEETS	NO	NO





# Comparing Platform Costs

What is the relative cost for each element/capability when using the platform?

	Targeting	Digital channels	Integrations	Programmatic	Site Personalization	Content Syndication
6Sense	INCLUDED	INCLUDED	INCLUDED	INCLUDED	SIGNIFICANT ADDITIONAL COST	NOT INCLUDED
Triblio	INCLUDED	INCLUDED	SOME ADDITIONAL COST	INCLUDED	SIGNIFICANT ADDITIONAL COST	NOT INCLUDED
Demandbase	SOME ADDITIONAL COST	INCLUDED	INCLUDED	INCLUDED	SIGNIFICANT ADDITIONAL COST	NOT INCLUDED
Terminus	INCLUDED	INCLUDED	INCLUDED	INCLUDED	NOT INCLUDED	NOT INCLUDED

You can get a ballpark idea of your ROI by using an [ABM ROI calculator](#).



# 6 Common CMO Concerns When Choosing an ABM Platform

Of the multitudes of questions CMOs ask The ABM Agency about choosing the right ABM platform, these are the ones we're asked most often:



## **1. Our team wants to keep using some of the solutions in our current tech stack because they're working well for us. How can we know how well an ABM platform will integrate with our software?**

Look for a platform that invites integration. This is a very important consideration to research thoroughly because integration issues can slow down or even set back your entire program. After looking through reviews about the specific solutions you want to integrate, speak with your solutions vendor about your plan to use a new ABM platform. Then speak with the platform directly, bringing up any caveats that your vendor mentioned and asking detailed questions about how integration is handled and managed. An experienced agency or outsourced integration expert will be able to give you a third-party perspective.

## **2. I want to make it easy for our sales team to identify the hottest prospects and take action. How does the platform make the data actionable?**

Look at how the platform identifies accounts, scores leads, and reports on sales funnel activity. Does it have a built-in repository for lead scoring, does it require you to write rules manually, or does it use AI to score automatically? Also—does the dashboard allow you to see data in real-time? Confirm that the data provided is accurate and from the optimal sources.



# Common Concerns con'd

Of the multitudes of questions CMOs ask The ABM Agency about choosing the right ABM platform, these are the ones we're asked most often:



**3. Will the platform be able to scale as quickly as we need it to? Once we start seeing success, we want to start personalizing.**

Look for a platform that's efficient at growing the kind of engagement, relationships, and loyalty that personalization delivers—the platform will need to include more than just programmatic. All of the platforms discussed in this paper offer some form of personalization but they don't apply it equally. [You can see What is 1:1 and 1:Few Account-Based Marketing?](#) for a thorough discussion about personalization. For insights into scaling effectively and seamless customer experiences, you can see [Omnichannel Marketing in ABM: Insight Into the Return on Account-Based Marketing Strategies](#).

**4. I'm concerned the contract bottom line might not represent the true cost of running our program on the platform—that there may be hidden fees or we'll have more internal responsibilities than we expected. What's the best way to know the true cost?**

Look for a platform that itemizes costs and is transparent in all of your conversations. It's a process to get to the actual cost. Pricing usually comes in round two or three of your discussions, after the pitch demo and an in-depth conversation about features. It's best if the contract defines not only what's included in your package and what's not, but which activities your team is responsible for. Also, make sure to ask about anticipated price increases. A neutral third-party expert with experience in the platform will have first-hand insights into actual costs and be up-to-date on upcoming platform changes, including pricing expectations.



# Common Concerns con'd

Of the multitudes of questions CMOs ask The ABM Agency about choosing the right ABM platform, these are the ones we're asked most often:



**5. We're ready to get our program going now—the timing is right. How can we know if a platform will make good on its promises for fast onboarding and program implementation?**

Look for a platform that provides an onboarding timeline with no missing pieces. You should know what to expect and when, including what's involved in the training process (if there is one). Don't start executing your program before you have the ABM database management and reporting analytics plan figured out—definitely include these items in your RFP to ensure you'll get what you're looking for.

**6. We've experienced bottlenecks when trying to resolve issues with cloud providers. What's the best way to be sure a platform will respond to and handle problems quickly when something goes wrong?**

Look for a platform that's gotten high marks from users for ease of setup, use, and support responsiveness. Conversely, reviews that mention confusion or time lags can be red flags. When you pay for a package above the basic level, you should get a dedicated account manager and customer service reps with high availability. It's a definite plus if your package also comes with advisory services. Your best bet for not having to deal with monitoring and troubleshooting in-house is to work with an agency that will run and manage your ABM program for you.



# How Do You Choose the Right Platform?



Before starting your decision-making process, it's best to identify your must-haves—you may be able to eliminate some platforms right off the bat. You'll also reduce research time if you know what (and maybe who) is needed to fill the gaps in your current program. Surveying your team for their input is helpful before researching and again once you have your top choice or shortlist.

Here's a checklist to help guide your process:



## **Thoroughly understand your ABM audience and ABM needs.**

- » Consider your use cases and ABM long-term strategy.

## **Know your available internal bandwidth for running the platform**

- » Determine if you have the staff and skillsets in-house for onboarding activities, content writing, and managing and running the platform.

## **Decide which, if any, of your current software you want to keep in your ABM tech stack**

- » Understand that integrating software into a new platform, if it's possible, may require specialized skills.

## **Understand the differences between the platforms**

- » Take the time to thoroughly research how each platform handles your priorities.





## Con'd



### **Consult an agency or colleagues who are experienced with your top choice**

- » Getting real-world insights will help you differentiate between hype and reality.

### **Schedule, or have a director schedule, demos with your top platform candidates**

- » Note what a platform doesn't in addition to what it does, and be able to explain why your final choice is the one that best meets your company's needs.

### **Begin the proposal process**

- » Expect a series of meetings to review features, packages, timelines, and, finally, pricing.

### **Manage your expectations**

- » Understand that getting up and running on a new platform takes time, as does beginning to identify and engage new accounts.





## Taking the Next Step

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The purpose of this guide is to help you arrive at the best decision when choosing the ABM platform to meet all of the needs of your company and program. While there's a lot of information to consider, finding the optimal platform is worth the effort.

The right platform can be a game-changer in the success of your ABM program and its business-building results.

If you want help getting to the right decision—or don't have the bandwidth to complete the research or make the change internally—reaching out to an agency with experience running all of the leading platforms can expedite your process. The ABM Agency helps companies in this situation and is available to migrate and integrate tech stacks and run and manage omnichannel ABM campaigns. As a platform-agnostic, full-service agency, our goal is to partner with you to find the optimal solution rather than steer you toward one platform or another.

For additional information on ABM success, you can see our Resources at [The ABM Agency](#). Please contact us if you'd like to learn more about how we work with ABM platforms or to schedule a demo.

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