



Account-Based Program of the Year

An organization or team exemplifying a best-practices approach to account-centric programs with proven success.

THE WINNER

workiva

The Challenge

As a global company with 2,000+ employees, Workiva's internal operations rely on many moving parts working in alignment. Last year, the Workiva team uncovered two challenges impeding the success of its ABM program. It was clear they needed to make changes to improve GTM efficiency.

The first challenge: operationally scaling ABM workflows with automation. Workiva's Marketing team wanted a way to automatically add high-value account targets to ABM campaigns based on buying triggers.

The second challenge: Workiva's Sales and Marketing teams discovered they were stuck in an unproductive feedback loop. Marketing would say the Sales team was not working target Accounts, and Sales would reply that the Accounts were not qualified enough.

Both challenges signified a need for a comprehensive re-evaluation of Workiva's Account segmentation and ABM structure and process.

The Operational Approach

To solve these challenges, Workiva kicked off what they called "Operation ABM GTM." Implementing an ABM overhaul meant building strong cross-functional relationships among

stakeholders. Workiva brought together key stakeholders from across multiple teams and discovered a critical need to evaluate their Account segmentation and tech stack.

The group first conducted a deep analysis of Accounts for more effective segmentation. Then, they audited Workiva's tech stack to understand all of the functionalities at their disposal. This helped them explore the best methodologies for integrating key Accounts into campaigns with automation.

Ultimately, they discovered that a new 6sense integration with LeanData, along with LeanData's updated Account routing functionality, enabled Workiva to associate Accounts with Salesforce campaigns after a key buying trigger event.

Once Workiva identified its best segments, Marketing initiated segmentation through 6sense and Salesforce campaigns to meet Sales where they work best.

Operational Results

Workiva's refreshed operational workflow enabled the Marketing team to stay agile and boost alignment with Sales. This reduced account noise, streamlined handoffs, and enabled a more productive GTM feedback loop. Overall, Operation ABM GTM was a success. Workiva's ABM process improvements have saved the team time and resulted in efficient pipeline generation.

Moving forward, Workiva's GTM team plans on continuing to learn from this project and discovering ways to further improve account-based efforts.

Measurable outcomes include:

- \$41 million in year-to-date pipeline generated.
- 68% decrease in target account noise with augmented segmentation.
- 50% decrease in time-to-insight for greater scalability.

"By shifting our focus to a more account-based marketing approach, we are getting closer to the ultimate goal of developing, warming up, and passing over Buying Groups to the Sales team. This case serves as a model for organizations seeking to enhance their marketing and sales alignment, lean into their techstack, and drive long-term growth through ABX."

Taylor Conlon, Director of Global Marketing Data & Analytics, Workiva