



ABM PLAYBOOK

Tips and Tactics for Account
Based Marketing Success

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Do Some ABM

ABM. The acronym is bouncing off walls and whiteboards across the country, as account based marketing fever sweeps the nation. While everyone name drops it, if you start hunting for ABM tactics, you may come up short. We have been “doing some ABM” for years and we’ve learned through success and failure which tactics have worked for us. If you’re already on board, but you don’t know how to get started, this playbook is for you.

Here’s what’s in this guide:

01

Tactics to ensure your account based marketing starts on the right foot.

02

Sample timelines for sales and marketing teams to start executing ABM plays.

03

Battle-tested ABM plays with all the nitty-gritty, tactical details you need to inspire you to “do some ABM.”



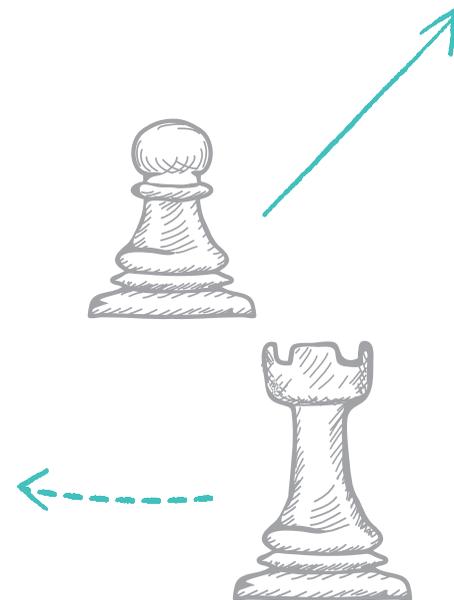
Part 1 ABM RESEARCH

Define your Ideal Customer

Imagine this: you spend months working on a huge account to take a meeting. You blow through marketing dollars like there's no tomorrow on this account. You have them surrounded on every channel... and finally, it happens! They take a meeting. You do a great, in-depth sales call and you realize the truth: they aren't the right fit for you.

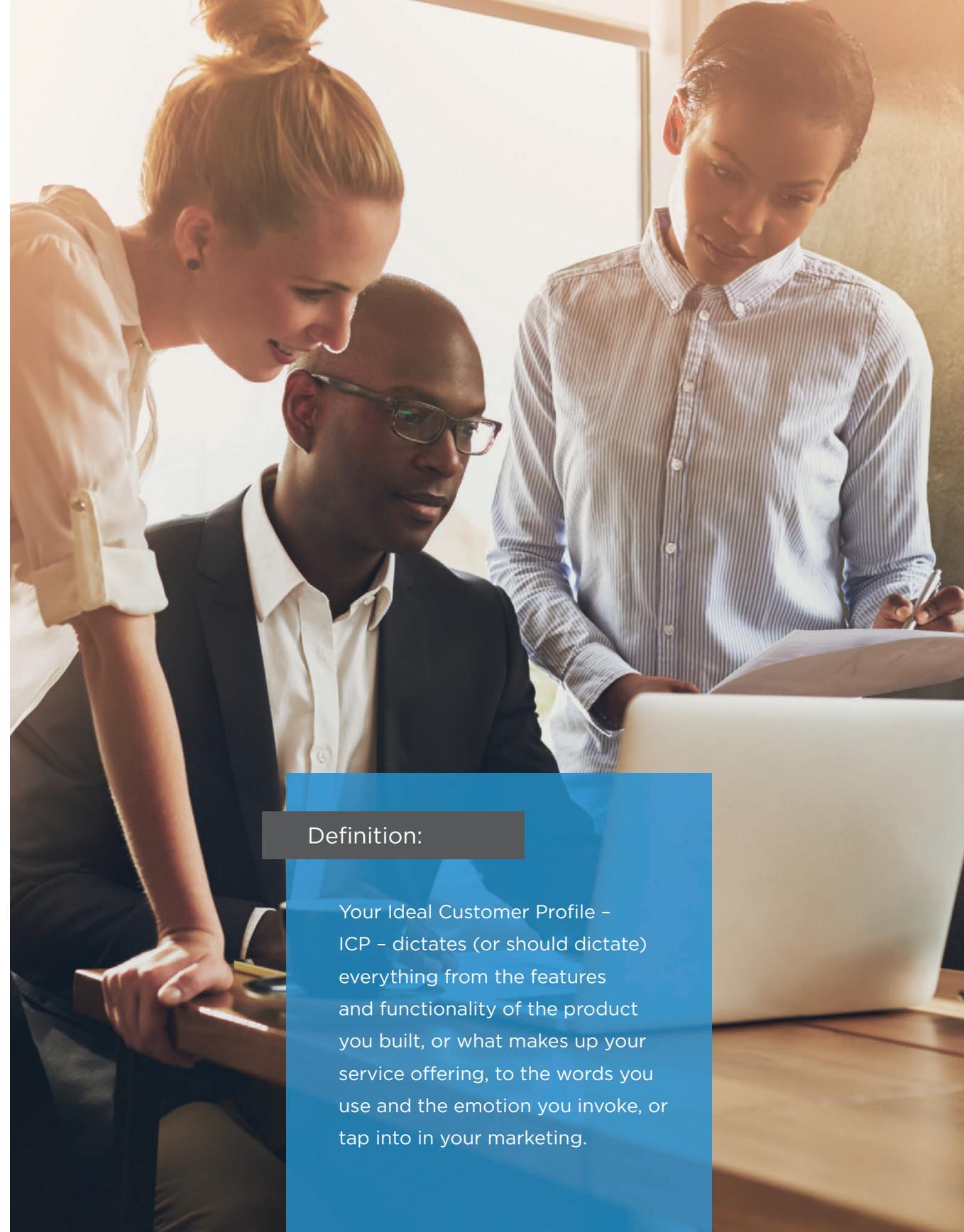
How did it happen? You didn't define your [Ideal Customer Profile \(ICP\)](#). Or if you did, you left it on a document buried somewhere on your desktop.

Ready to make sure this doesn't happen to you?



Definition:

Your Ideal Customer Profile – ICP – dictates (or should dictate) everything from the features and functionality of the product you built, or what makes up your service offering, to the words you use and the emotion you invoke, or tap into in your marketing.



Seven Questions to Determine your Ideal Customer

Before you pull data and map accounts, you need to figure out who you want to target. Get your sales and marketing teams together and answer these questions about your ideal customer.

Record the answers, brainstorm another ICP, then do it all over again. Once you have found your ideal customer, you're ready to move on. Some companies target multiple ICPs, and that works too.

01

With which verticals do I have experience? Where are my past success stories?

Breaking into new verticals is difficult, so stick to what works, or choose satellite verticals around an industry for which you've already scored success.

02

Do I have baseline requirements for accounts?

Keep your ROI in sight and consider raising your requirements for ABM accounts, because it is certainly going to cost you more to execute an ABM campaign. Rule out accounts that can't use your solution in a timely manner or otherwise are a poor fit based on size, geography, or other firmographics.

03

What problems does my ICP have that I can solve right now?

Think about your ideal customer's space. Get to know their market and understand how your ideal customer is solving problems in that space. This will help you tailor personalized content for ideal accounts that resonates and speaks directly to their core mission and values.

04

How does timing affect my ICP?

Are accounts that just received funding a good fit for you? Or are there signs a company is moving too quickly, and may not be in the best place to dedicate the time necessary to fully adopt your product? If the answers point to an incongruous fit, expect further problems down the line.

05

What's the ideal sized account for me?

Don't get blindsided by huge dollar signs. While landing a huge enterprise account seems ideal, you need to step back and consider if they really are a good fit for your product. There's more to an ideal customer than money. Do you have the processes and resources in place to support selling into companies of that size? Can you afford extremely long buying cycles? What sized account does your product typically work best for, and why? Keep in mind that your ICP can evolve over time as your business, the market and your products evolve.

06

What job titles am I targeting? Does the company have the right ones for my product?

Look at where you have been successful in the past. What job titles give you the best traction? Which ones don't? It's important to target accounts whose needs match what you have to offer. If your product relies on a large marketing team, don't target a start up account. If your solution is a quick fix, perhaps an agile team is your best bet. Look for structural facts to use as key indicators to your overall compatibility with a prospect.

07

What makes my ideal customer valuable?

It may be more than revenue. Some customers bring brand recognition to your efforts. They may serve as a foothold into a new vertical, or be critical in forging a partnership. Think beyond revenue, but remember that ABM is always going to be time and resource intensive.

Account Selection

Now that you know who your ideal customer is, what they need and what they look like, it's time to create a list of accounts. Ask your sales team what accounts they are familiar with, and which would be good fits. Getting sales on board with your selections is key to ABM success. They likely won't give attention to accounts they don't believe are a good fit for your business.

This step of the process can make or break your campaign, so choose wisely. Use insights from your ICPs to pick accounts, then get into the nitty-gritty of building a list. Here are some tips on how to move forward:



“As soon as the account based model takes hold, it leads to more personalization and more human touch.”

Craig Rosenberg
Co-founder and Chief Analyst, TOPO

Account Mapping

Now that you have your list of target accounts, it's time to map out the contacts you need to reach within each account.

Remember, the integrity of the data you start with will have a dramatic impact on how well your ABM campaign works — and how crazy it drives you in the process.

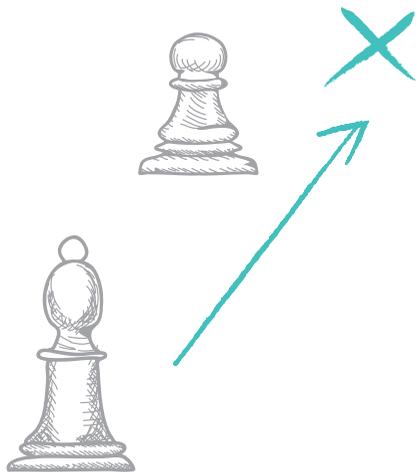
It's worth carving out a considerable amount of time and resources to get contact data as accurate as possible. Successful ABM programs rely heavily on highly personalized outreach, so you don't want to waste time personalizing assets, emails and direct mail pieces that never reach your contacts due to bad data.

Map the Formal Structure

The account mapping process clarifies the formal structure within an organization. By understanding how your target account's internal teams are organized, you can understand how they buy, how long their buying cycle takes and who makes the ultimate decision to purchase. You build the baseline for how you'll target contacts within the account.

Acquiring contacts costs money and takes time, so make sure you choose contacts that actually matter. For instance, if you target an enterprise like Dell, the full account has thousands of contacts — most which don't move the needle. Let your Ideal Customer Profile guide you. Use those insights to decide which titles and departments influence the buying decisions that affect you.

Know all of the contacts' titles, contact information (including mailing address), and how long they've been in their position. We use a combination of data verification methods.



How We Map an Account

- Run contacts through several data partners (we love Oceanos and ZoomInfo).
- Internal employees manually confirm data using LinkedIn Sales Navigator by looking for address info, job title details and verifying the contact still works at the account.
- Out of resources? We've used TaskRabbit to do the manual data checking.
- Map how a decision passes through the structure. Get help if you can! Predictive technologies like DiscoverOrg's OppAlerts, Owler, RainKing and DataFox can help you map an account.

Map the Informal Structure

This is a more subtle way to map your account, but it's just as important as the formal structure. The informal structure of your account will show you how people influence each other. Understanding this web of influence is critical to driving your message home, especially when you're sending tangible marketing that creates a human connection.

Getting this structure mapped is not going to be simple, and it will require many manual hours of effort. Before you dig into this tactic, make sure the account is worth the effort. Do they strongly align with your ICP? What's the cost of not landing this account?

Get serious before you get informal. When you're ready, ask yourself the following questions to develop your informal account map.

- 01 Are there contacts that could be powerful influencers but are remote employees?**
Check their address. If they're a remote employee, they may not have the same traction on a daily basis as other influencers, even if your formal structure says otherwise.
- 02 How long has an employee been with an account?**
Newer contacts may not have much influence within their teams (even if their titles suggests otherwise). Some accounts; however, may give new employees leverage. Don't forget how tenure works with a boss as well — if your target influencer just got a new manager, they'll likely need a lot of help convincing their boss you're necessary. You can dig through LinkedIn and tap contacts within an account to get a sense of how employee tenure drives decision making within the account.
- 03 How are different divisions in an account working together?**
Are they competing for resources? Are they sharing resources? Use a resource like LinkedIn, which lets users list significant projects and publications, to see how different contacts came together within a project.

20 Days to ABM Success

ABM campaigns require a different approach than traditional campaigns. You focus on personalized outreach while digging deep into an account. The process will cost you a great deal of effort, but it's worth it in the end. Move strategically and keep your goals in mind. The good news: you can do it all in just 20 days.

Day 1-5

Build your Ideal Customer Profiles

Sales process may be different for ABM, so work with sales to revisit MQL & SQL qualifications and handoff processes. Determine your KPIs and success metrics, scale them to be realistic if this is your first ABM campaign.

Choose your plays based on customer profiles and set your budget.

Day 6-15

Select your Accounts

The more strategic the accounts, the less you should target and the more personalized attention they should get.

Map your accounts — get sales involved if you can, the more they know up front the better they can sell later.

Start building your marketing assets, from emails to content pieces. These will require more personalization than other campaigns, so factor in extra time to get it right.

Day 16-20

Run your First Play

Have an honest conversation about leads and opportunities. How is your ABM campaign working? Did it return unexpected results? Compare results to past campaigns and recalibrate.

Start gathering metrics and scoring KPIs on your first sends.



Part 2 THE PLAYS

Play 1

Warm Contacts

Knee-deep in heavy SDR/BDR outreach? This play will get your contacts to pick up the phone. Scale this up and distribute it across teams within the target account. It will help build interest and warm up your calls. Be compelling, be alluring and most of all... be memorable.

Multi-Channel Warm Up

ABM depends on multi-channel success, and that calls for meticulous multi-channel orchestration. Warm up your contacts with tangible marketing that they can hold, open and pass around. Marketing they can touch.

Conversations start and then you'll start to see how tangible engagement drives digital responses. Studies show that email response rates rise to 7.9% when combined with tangible marketing and our customers are seeing much higher results. Real stuff warms your prospects to future touches.



Follow Up with a Call

Following a physical send with a call completely changes the dynamic of the call. You aren't calling to make a sales call, but to check up on a package you delivered. Use the package as a reason to get on the phone.

Launch Digital Outreach

After you've made the first call, start exposing your account to digital marketing. Use personalized retargeting ads, a tailored email campaign and personalized landing pages for the account. Always balance resources with opportunity, but get as nuanced as possible. If you have the ability to craft an email stream for each group within the account, you should. The point is: don't let warm contacts cool off. The more personalized you are in your communication, the more effective it will be to keep the conversation alive.

Control the Cadence

Cadence is important in this play, and it varies from account to account. Here's a table you can use to map out your 30-day cadence:



Play 1 Summary:

CADENCE

Structured, the important thing is to follow up with a phone call.

CONTACTS

Typically influencers with some light outreach to decision makers.

CHANNEL WEIGHT

- ✓✓ Physical
- ✓ Digital
- ✓✓✓ BDR outreach

Play 2

Wake the Dead

This play targets accounts that have gone silent. They were a good fit, aligned with your ICP and met all your qualification criteria. They may have been in negotiations, but then the deal went cold. Like, meat-locker cold. Need to raise an account from the grave? This play will help you do just that.

Why'd They Leave?

First thing's first: identify why they went cold. It's as easy as checking the Lost Reason in Salesforce. Sometimes it is you, other times it's out of your control. A change in staff, appropriation of budget, or changing goals could have pushed you off the table.

If the answer isn't that obvious, look inward. Were they a good fit? Were they really, really a good fit? Maybe it was you — are you out of their price point? Did you bumble the sales process? Did your marketing message miss the target? If you made a mistake on your end, move to fix it before you keep running this play, or make sure you know how you are going to address it in the future. The point is: fix it now.



Build your Approach

It's important to target the right contacts in ABM, but the situation is more critical when you deal with a dead account. Idle time has passed, and you may face a different landscape within the account. If that's your case, get ready to spend more time researching so you understand your new influencer, champion and decision maker groups.

Rally an Existing Champion

One way to bring back momentum is to rally an existing champion (if you have one). If a contact has already positively engaged with you, there's a good chance they will again. Make the champion one focus of your efforts, and then branch out and also connect with contacts within the champion's team, or group. If you do a good job, you'll generate enough interest to make your champion field questions about you. He or she will scramble to move forward and engage with you when the pressure comes from within.

You can spur an account back into action by simply allowing them to see your marketing materials around the office — especially a team that engages with your champion daily. A combination of digital and physical outreach can prime a champion to re-engage, especially if you make the messaging personalized and relevant.



Target New Champions

What if your champion is long gone? You will have to branch out and find new ones, unfortunately. This tactic is going to be different since you've already engaged with the account in the past. Try referencing key findings from the previous engagement, so you can bring the account back to a conversation.



“Every time a package ends up on my desk at work, I think: ‘ooh! What is it? It’s a very different reaction getting to a letter on my desk.’”

JT Bricker
Director of Communications
Charter Spectrum



Use Tangible Channels to Gain Visibility

Sometimes an account needs to be jarred before it wakes up. A digital message is easily ignored. But if you amplify its message with physical channels your marketing can really make a splash. Physical channels like dimensional mail tend to be more expensive than other channels, so be sure to balance that spend with opportunity.

Consider using a lower-cost (but high-impact!) physical send for a dead account: packaged content, low-cost swag, or a simple mailer. If you are rallying an existing champion, tailor the piece just for them. Send a personalized note thanking them for their efforts and extend an invite for a meeting. If you are trying to get some face time with an important decision maker, send them a printed invite to meet you. Target them when you'll both be at the same tradeshow, conference or user group. Timing is key to successful non-digital outreach.

We once sent a case of branded Nerf guns to an entire department in a then-dead account. The team proceeded to do what anyone would do with a box full of mini Nerf guns — shoot each other! One of our BDRs called the account champion a few hours after the package delivery, and although we broke up the office fun, the champion paused to pick up the phone. By emotionally appealing to the account, and creating buzz within the entire account, we were able to reignite conversation.

Play 2 Summary:

CADENCE

Medium

CONTACTS

Varies

CHANNEL WEIGHT

✓✓✓ Physical

✓✓ Digital

✓ BDR outreach

Play 3 Land a Huge, Named Account

ABM excels at landing large, complex accounts. While their pockets run deep, their buying cycles can be complicated, tangled and move at a glacial pace. You can turn those obstacles into stepping stones, as this play will help you land a Leviathan.

Target Multiple Personas within the Account

Slice your huge account into more manageable pieces — your formal and informal account mapping is going to be especially important to this play, so make sure you've done your homework. Double check your data before you begin this play. Accuracy is key.

A marketing manager and a CMO shouldn't receive the same communication pieces, so break your personas into influencers and decision makers.



For Influencers

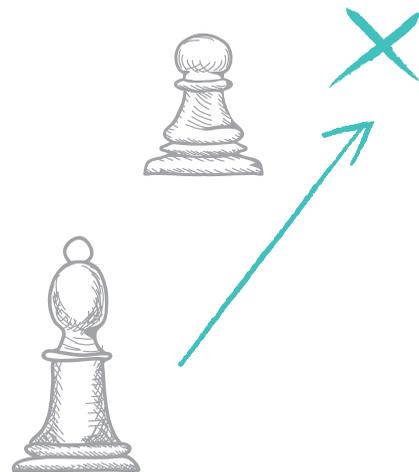
Use a combination of digital outreach and tangible marketing to grab their attention. Then, you can reward behavior, such as attending a meeting or demo.

For Decision Makers

Use lower price-point physical sends that still have high impact. A CEO may not feel inspired to take a call just because you sent them the year's most popular, pricey tech toy. Keep the cadence of your digital touches light. You should stay in the back of their mind, so they remember who you are when their influencers mention your brand.

The Goal

Work on influencers and turn them into champions, then set them loose on decision makers to build your sales case.



Influencer Play

The goal with this play is to get your influencers on board so they can help you sway the decision makers.

- Send a package with content relevant to the influencer's role.
- Follow up with emails, retargeting ads and calls (see Play 1: Warm Your Contacts)
- If you've got multiple influencers spread throughout the account, target them all with different messages. You can even try to bring them all together with something fun (snacks, games, puzzles, riddles, etc.).
- Finally, offer a nice reward for attending a meeting or demo with you. The influencer must take action before they get their reward. Asking for a commitment on their end will boost their engagement with you (and it helps you keep costs down, as you won't be throwing expensive gifts into the wind).

“Anyone who tries to do influencer, advocate, or ABM marketing should have a direct-mail component as a part of their strategy.”

Jessica Cross
Head of Customer Lifecycle Marketing, Adroll

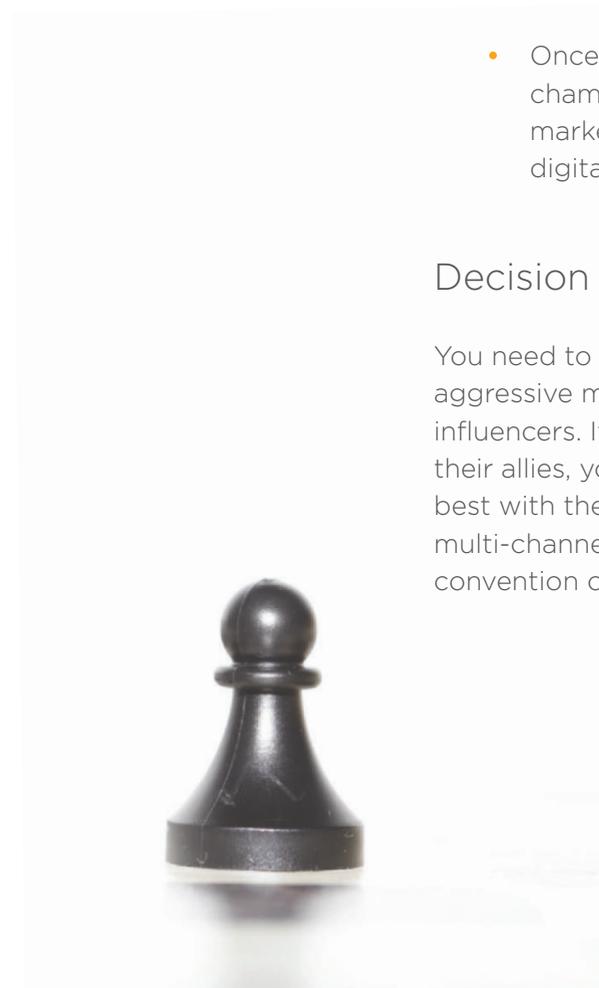
Decision Maker Play

The play here is to stay in the back of a decision maker’s mind until you’ve got buy-in from influencers, then unleash a compelling tangible send.

- Reach out with digital messages. Skip the phone calls unless it absolutely makes sense.
- Send low-cost, but highly polished, memorable, tangible marketing to keep yourself at the top of their minds.
- Once your influencer groups begin to convert to champions, send decision makers high-end tangible marketing, hyper-personalized emails and memorable digital ads.

Decision Maker Plays Require Balance

You need to stay on their radar, but hold back with your most aggressive marketing until you’ve built sufficient traction with influencers. If the decision maker hears about your brand from their allies, you’re more likely to break through. Face time works best with these busy people, if you can earn it. Use a true multi-channel approach to set up a meeting at a tradeshow, convention or user group.



Be Structured, Stay Flexible

Big accounts need a different cadence than smaller accounts. This section describes outbound cadence tactics to use and also info on how to be flexible and respond to traction within these large accounts.

Personalization Overdrive

With high-value accounts, personalization isn't just important, it is absolutely critical. We suggest taking the time to create custom content that resonates with groups within the account and with specific decision makers.

If this all seems like a giant resource drain, that's because it is. You would never attempt this level of extreme personalization with an account that wasn't a true whale for your brand. Huge doesn't have to mean a giant employee base. It could mean high value, coveted access, a great partnership, or massive exposure for your brand.

Play 3 Summary:

CADENCE

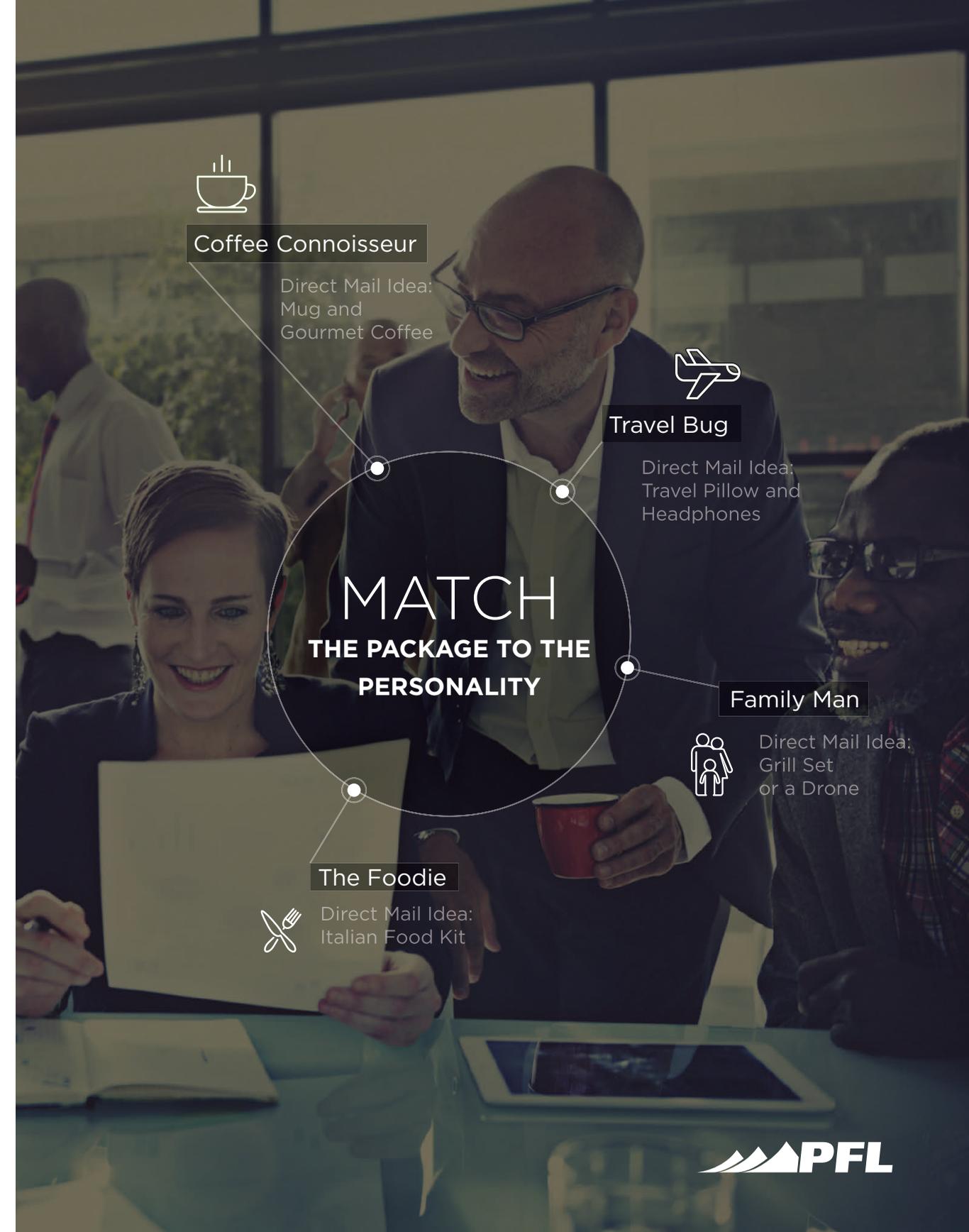
Tailored for the account but usually aggressive.

CONTACTS

Influencers, decision makers — a classic multi-pronged approach.

CHANNEL WEIGHT

Physical
Digital
BDR outreach



Play 4

Land a Larger Group of Smaller Accounts

Smaller accounts require less attention, yet you must cast a wider net to catch more of them. This play is perfect if you're trying to establish name and credibility in a market before you snag a huge brand.

Industries as Accounts

In this play, you tailor your tactics for a vertical, rather than a specific account. Think of your verticals as your accounts. Every account in the vertical will use the same jargon, have similar pain points and want similar value. Start your research here:

- Scrub company sites, blogs and follow thought leaders to learn the language.
- Attend webinars and go to an industry conferences.
- Hire a consultant within the industry or find one you like and follow them on social media.



Create a bold campaign that applies to many accounts.



Get your own teams ready for the high volume of leads.



Keep time, budget and resources in mind.



Be Broad and Be Bold

It's not as important to be specific in this play, but it's certainly important to stand out.

When you're planning a tangible send, don't be afraid to send something that's fun. If it begs to be held, touched and used, that's even better. We've literally sent toys: remote controlled cars, drones, Star Wars droids, Nerf guns and Legos as fun options. Your overworked contacts will appreciate the break and remember you.

- Be bold and catchy with your language even if it's hyper-personalized.
- The point is: don't let them forget you.
- The other thing to keep in mind is price.

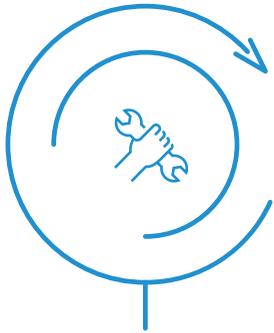
“What do you send the CEO/ CRO of a Fortune 500 Company, exactly? Our campaign showed us that it's important to create a tactile piece that's memorable, and ties to your campaign product.”

TJ Nokleby
Manager of Demand Generation, InsideSales.com



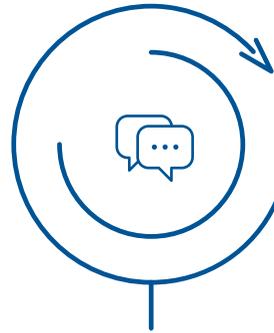
Get the Team Together

You're working with a higher volume of accounts with this play, so it's imperative that you align your sales and marketing teams. How do you get everyone on the same page? Here are a few tips:



Process, process, process.

Build a sales and marketing process for handling leads, qualifications, follow up and communication.



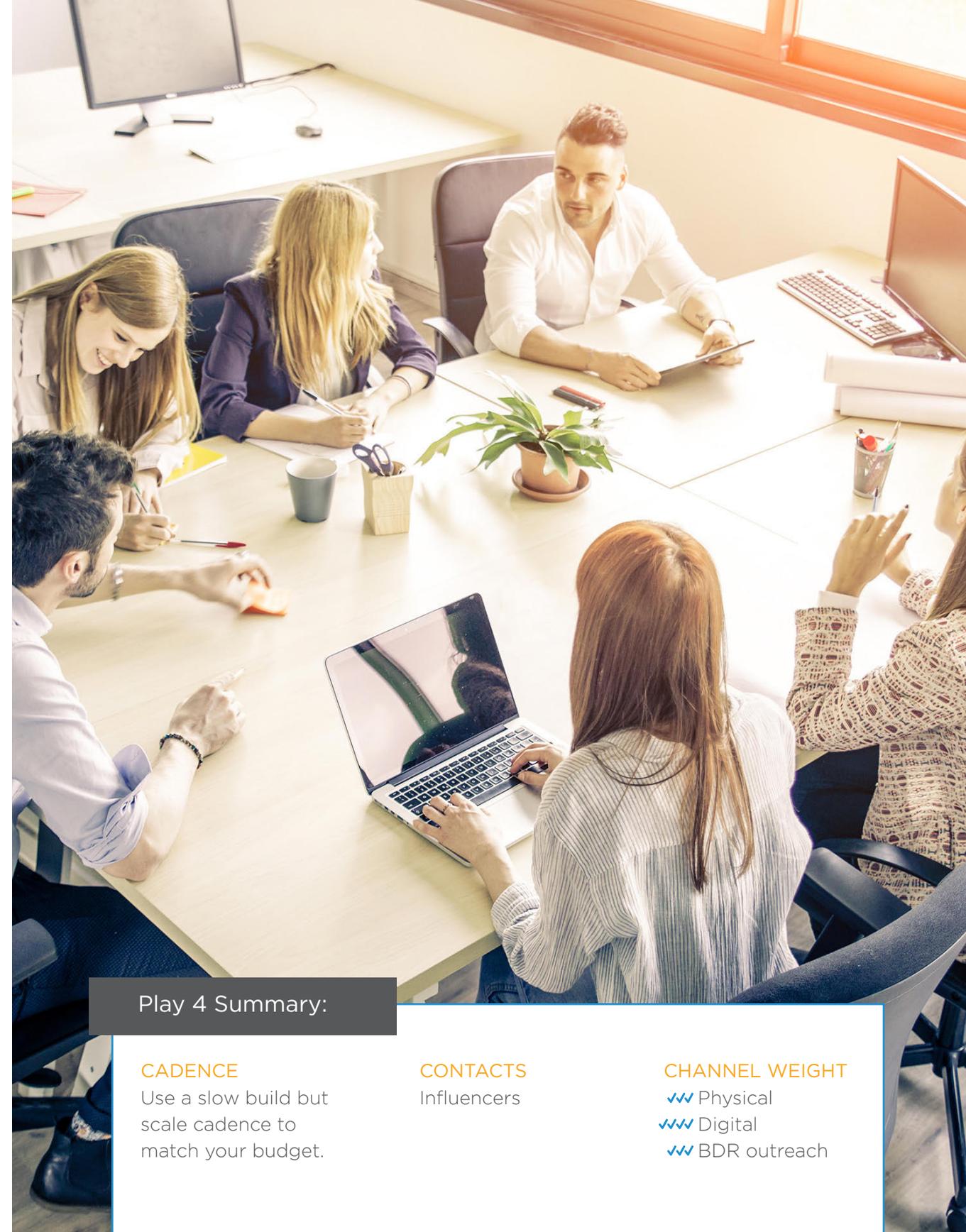
Over-communicate.

Everyone should know where an account is in the sales pipeline at any given time. Your CRM is, of course, critical, but don't stop there. Have stand-up meetings, call each other and get face time as much as possible to keep your teams aligned.



Get buy in from sales at the start.

Don't make a grand marketing and sales plan that leaves sales out in the cold. They'll just toss your plan in the trash.



Play 4 Summary:

CADENCE

Use a slow build but scale cadence to match your budget.

CONTACTS

Influencers

CHANNEL WEIGHT

- Physical
- Digital
- BDR outreach

Play 5 Grow Customer Loyalty

ABM not only helps you land the perfect account, but its tactics help you grow post-sale account loyalty too. The best way to do that? Make sure your customers are successful. This play will help you target contacts within the account that are underutilizing your solution and spur them to action (all the while making them feel like a hero!).



Set goals with your customer, be part of the conversation.



Dedicate your resources to your customers' success.



Turn champions into heroes with a real reward for their effort.



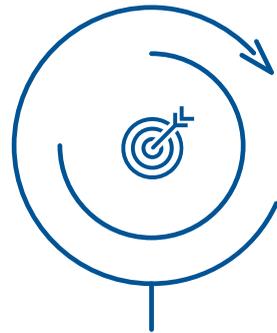
Make Sure Your Customer Uses Your Product or Service

Here's the sad truth: in a large account, your solution may be purchased, set up and ready to go but your actual users may not even know you exist. Your first order of business is to make sure they know who you are, and then use your product as much as possible. Identify the influencers within your user groups and try some of these tips to ramp up actual use.



Existing Champions

Start with champions you've already earned (there are some from your sales process) and reward them for helping you bring users onboard.



Target Users

Start with a digital send, like an email, targeting everyone that should be using your service. Get them to respond so you can start to mine more data on them, helping you build a better persona for your slow adopters.



Potential Champions

Find potential champions, like the ones you've already earned that are in different groups, use your formal and informal account maps to figure it out.

Deliver the Right Content at the Right Time

Now that you know who your targets are, you have to feed them educational content at the right time. Move quick, be a squeaky wheel and stay in front of your groups. Rely on your champions to spread the word and onboard users.

- Lead workshops and product trainings to get your account on board with how to use your product.
- Host an event or webinar to keep interest keen.
- Use a multi-channel approach to get content into your customers' hands, make it simple and easy to use so they adopt fast.

Help Customers Define and Monitor Success

Sometimes your customers' success [Key Performance Indicators \(KPIs\)](#) won't be optimized for the real world. They may be too ambitious or shoot too low. Establish real expectations based on their unique situation.

01

If possible, have a dedicated customer success manager that is in contact with your customer.

02

Establish KPIs that make sense. Use data from other, similar customers to help them build realistic KPIs.

03

Follow up with structured customer check-ins. If you can, have a dedicated customer success manager that can go over metrics and goals. Realign expectations, change up your strategy and make sure your customers are seeing the success you want.

Definition:

A Key Performance Indicator – KPI – is a measurable value that demonstrates how effectively a company is achieving key business objectives. Organizations use KPIs to evaluate their success at reaching targets.

Make Heroes, Earn Respect

This isn't about you, it is about your customers. Make them heroes for using your product or service. Here are some tips for elevating your best customers into internal champions.

Reward Type

What type of reward will resonate best with your customers? Product discounts, free training, conference passes and gift cards are a few options. Choose the appropriate reward type (or types, if you are going to let customers choose) based on customer demographics.

Reward Size

How big does the reward have to be to matter? In general, senior-level buyers require larger rewards. What will your budget permit?

Milestone Rewards

Will you provide rewards only when customers reach certain milestones with your solution? Set milestones with your customers as part of onboarding and celebrate each one.

Highlight success with your product

Showcase how your champion (or group of customers) is impacting the business with your product. Send quarterly updates not only to your champions, but to their bosses, the organization, and industry as a whole.

Single or Double-Sided

When establishing a referral program will you reward only the referrer? Or is there something you offer the lead as well, so that they too benefit from coming in as a referral?

Make it Physical

Send them a snazzy thank you, or package in the mail, alongside digital communication.

Play 5 Summary:

CADENCE
Aggressive

CONTACTS
Champions,
potential
champions, users,
executive level.

CHANNEL WEIGHT
✓✓ Physical
✓✓ Digital
✓ BDR outreach

Play 6

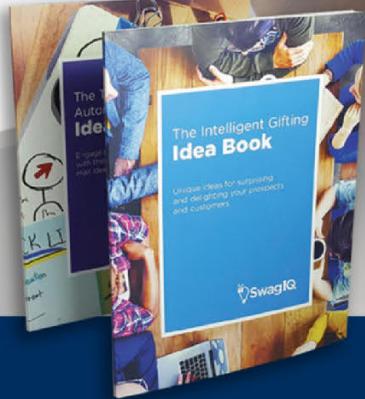
Land and Expand

Once you've landed a division within a large account it is time to expand. This play helps you do that, using ABM tactics to grow influence throughout the account.

Make Customer Experience a Priority

Focus on delivering high quality service to the areas you've landed. Nothing you can do to move the needle will work as well as old-fashioned word of mouth. But make sure you advertise your customers' great experiences. Send out updates to your customers, maybe highlight specific success stories. Use your customers' success to amplify your brand.

- Try a rewards program for your customers.
- Make sure there's plenty of great educational content that's easy to use.
- Listen to feedback and be transparent with your service — give them a VIP experience.



Reach Out to Internal Champions

If you've already got an internal champion, leverage them to get further with the account. Here are some tips to entice your champion and get them to help you out.

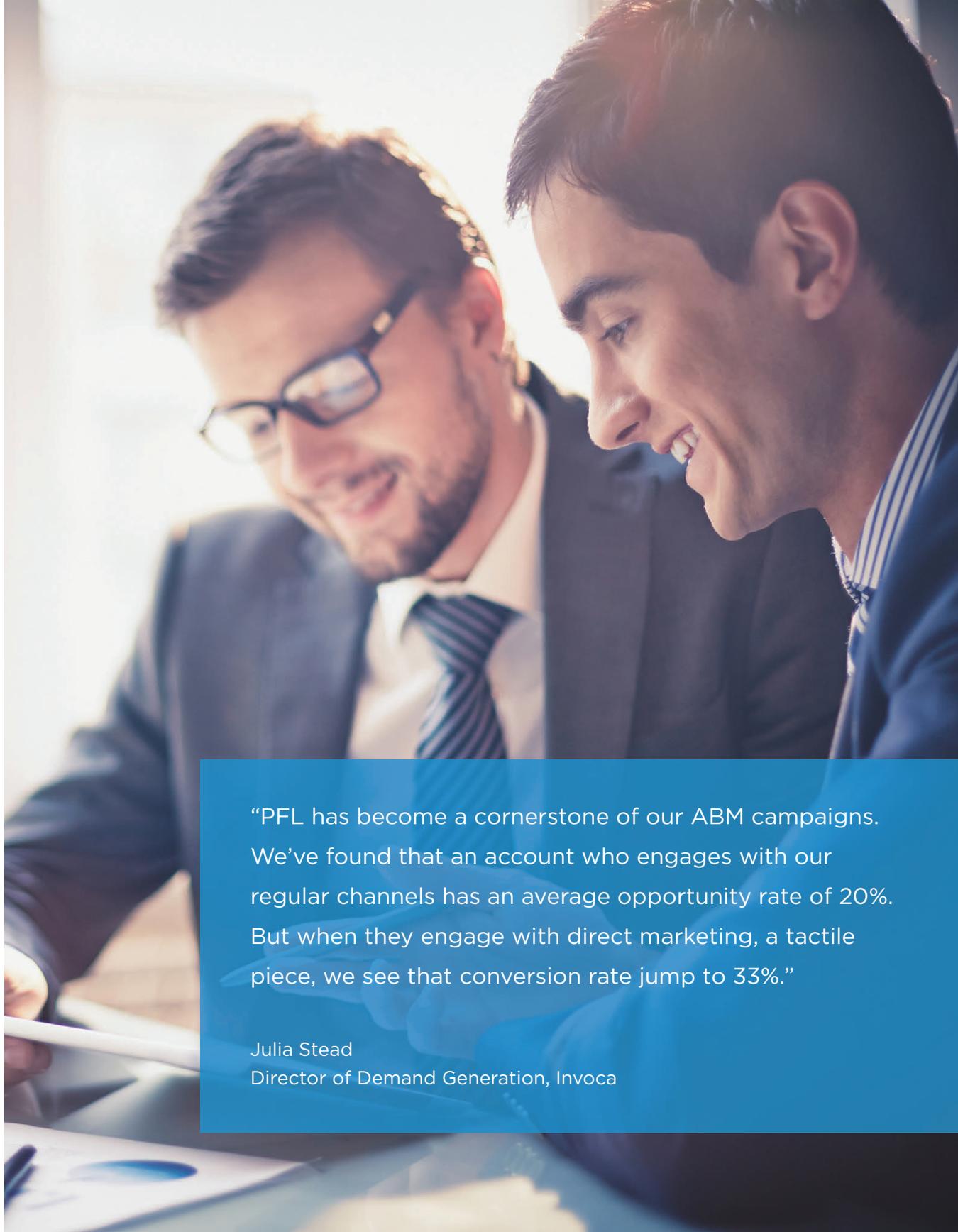
- Ask your champions for intros to other potential champions in the account. Make it easy on your current champion and give them a profile of who, exactly, you'd like to meet and how you'd like to help them.
- Once you get a tip on a new team, send them all some cool, branded swag to get their attention. Follow it up with relevant, useful content and don't be afraid to reference your existing champion - it will help your credibility.

Play 5 Summary:

CADENCE
Aggressive

CONTACTS
Champions,
potential
champions.

CHANNEL WEIGHT
✓✓ Physical
✓✓ Digital
✓✓ BDR outreach



“PFL has become a cornerstone of our ABM campaigns. We’ve found that an account who engages with our regular channels has an average opportunity rate of 20%. But when they engage with direct marketing, a tactile piece, we see that conversion rate jump to 33%.”

Julia Stead
Director of Demand Generation, Invoca

Let Direct Mail Give you a Competitive Edge

We at PFL have consistently found that human connection, personal attention and an amazing customer experience will make your outbound ABM efforts more effective. Wildly effective, in fact. We've seen 120x ROI from clients that put these tactics to use. We've seen engagement rates triple, sales cycles shrink and millions of dollars be added to the pipeline activity. Most importantly, customers praise the personal touch.

If you understand the web of influence in your accounts — the informal structures that drive real decision making — you hold the key to building the powerful human connections that make ABM the buzzword it is today. A fully orchestrated, multi-channel approach leverages that influence to drive engagement and drive results.



About PFL

PFL is a marketing technology company that provides sales enablement and marketing automation solutions, as well as printing, mailing, and fulfillment services. We directly connect B2B and B2C organizations to cutting-edge solutions that accelerate productivity and drive business forward.



Ready to give
your marketing
a boost?

Call us at 800.930.5088 or send an
email to inquire@pfl.com.

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