



The Sales Leader's Guide to Account-Based Selling Software

Contents

I. Account-based selling software: what it is and why it matters so much right now

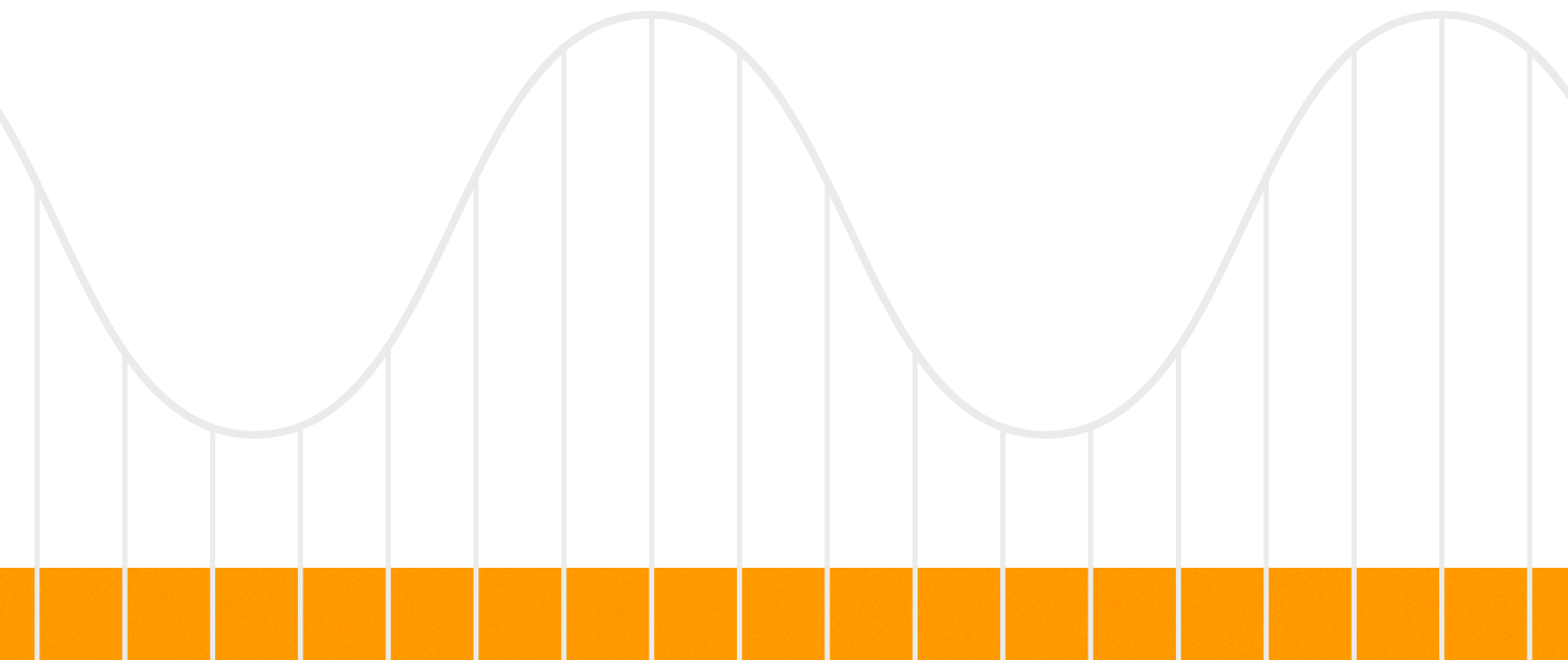
- A. The rise of account-based selling
- B. 3 things ABS software can do for your team
- C. Why does ABS matter right now?

II. Finding the right account-based selling platform

- A. The evolution of ABS tech
- B. What can (and can't) ABS software help you do?

III. 3 key outcomes of account-based selling software

IV. The next frontier: AI and beyond



Account-based selling software: what it is and why it matters so much right now

The rise of account-based selling

The days of lone-wolf selling are over, particularly when it comes to your company's most strategic accounts. In an era of ballooning buying teams, complex sales processes, and knowledgeable customers, a single seller talking up a product's flashy features simply won't get the job done anymore.

Account-based selling (ABS) rallies your entire revenue team around each high-value account and, in collaboration with the customer, uncovers the real business motivations behind their purchase. By bringing in a wide range of perspectives across marketing, product, customer success, sales, and others, you can paint a more complete picture of the pressures facing the account, the most important people in it, and the unique ways you can position your solutions to help them reach their goals.

It goes without saying that ABS is a complex dance. It requires extensive collaboration, heaps of data, and meaningful insights. That's where technology comes in. It's your people who make the difference for your customer, but it's your software that makes the difference for your people.

Account-based selling software should help your revenue team do three essential things:

- 1. Maximize both the size and velocity of your deals**
- 2. Identify, win, and retain business**
- 3. Drive more revenue**

Why does ABS matter right now?

Account-based selling isn't just another buzzword: It's a major response to the very real market factors influencing the business world today. It's no surprise that Forrester Research found that 63% of B2B sales leaders surveyed at the end of 2022 were implementing ABS technology or had already done so.

Uncertainty makes existing customers critical

In uncertain economic times, driving new business becomes much more challenging, and retention, cross-selling, and upselling take on a whole new level of importance.

Account-based selling (which, we should note, is also an essential strategy for winning new business) can help you build the kind of deep, trust-based relationships that keep customers around—and willing to grow with you. If you can pinpoint the challenges your customers are up against



and consistently help them hit their goals, you'll rise from being "just another vendor" to the level of a true partner—what we like to call a "trusted advisor." However you phrase it, being indispensable is an advantage like no other, particularly when customers tighten their belts.

Goodbye sales ops – hello revenue ops

It's a brave new world in the operations department. Once more narrowly focused on advising sellers, Sales Ops. has adopted a whole new persona. RevOps doesn't just focus on data management and reporting. It takes a broader approach, working across sales, marketing, and customer success to pull insights and share them internally to help teams make better business decisions.

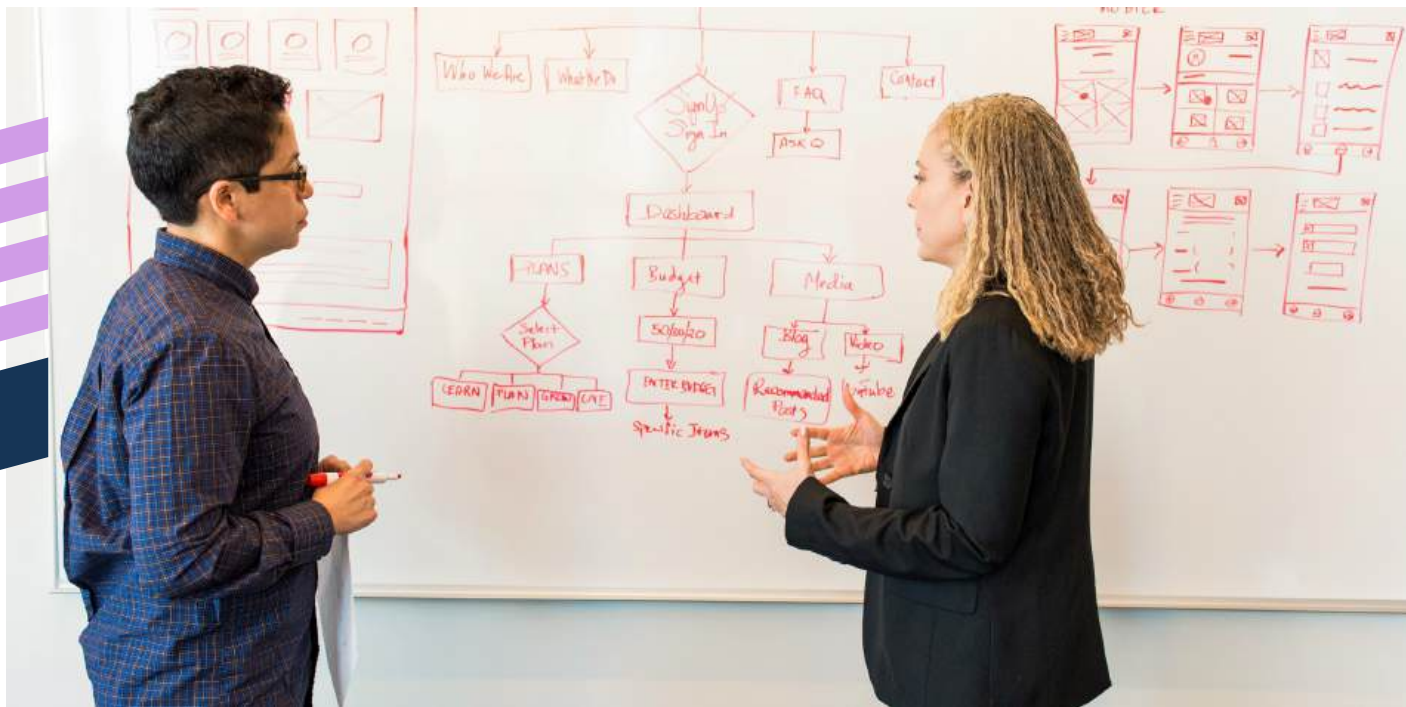
In recent years, operations teams have:

- Become less tactical and more strategic
- Brought together a wider convergence of teams and stakeholders
- Benefitted from better, more cross-functional data

A convergence of revenue operations, revenue intelligence, and sales engagement

Delivering real value to customers is more important than ever. Most sellers won't enter a sales cycle until 60-80% of it is already complete, so it's critical that teams have the technology they need to pick up on intent signals, buyer behaviors, and more so that when they do engage, they're well-informed on customer's business motivations and well prepared to solve them. Just as importantly, these insights must be evangelized across those working at every stage of the customer lifecycle so that everyone in the revenue ecosystem can show up with the value your customer expects.

Finding the right ABS platform



The evolution of ABS tech

As the concept of account-based selling has evolved, technology has evolved along with it. Let's walk through the stages that have gotten us where we are today:

In the beginning: creating sales processes

In the early days of ABS software, technology was fundamentally focused on embedding sales processes and methodologies for teams. It took human processes and codified them in a software platform.

Evolution: better, less manual, and more valuable data

The second generation of ABS software was all about cutting out manual processes and helping revenue teams access data that could help them make more strategic and informed decisions. It reduced manual data entry, made data more useful, and increased the way sellers could generate and use reports.

Now: a human-machine partnership

We're already seeing the next frontier of ABS software take shape. In it, artificial intelligence will proactively deliver insights more complex and immediate than humans ever could. It also fosters a new level of collaboration that allows everyone who interacts with the customer to work from the same, ever-deepening trove of data and insights that can help them understand and serve their customers in better, more proactive ways. As a result, sellers have begun to see value on a new scale, making them much more eager to adopt ABS systems to get and stay ahead.

What can (and can't) ABS software help you do?

With more powerful data analysis tools than ever before, ABS tech can take the foundations of account-based selling to a whole new level. Remember: the point of an ABS platform is to enable your revenue team to identify, win, and retain business.

ABS software can...

Reveal complex relationships

Any good seller knows that relationships matter. But the best sellers also know that understanding a customer's internal relationships is the essential foundation for understanding the account as a whole.

Officially sanctioned hierarchies govern every organization: organizational charts, for instance, spell out exactly who reports

to whom. But the influence they represent is also pushed and pulled by the political forces working beneath the surface. Who holds the trust of key decision-makers? Who stands to gain or lose out as a result of a particular purchase or project? What is their role on the buying team? Are they a supporter, neutral, or are they actively against your offering?

These insights are gathered by all sorts of people who interact with the customer, from salespeople to consultants and customer success managers. But by pulling these valuable observations out of individuals' heads and centralizing them in a platform, systems can identify, visualize, and highlight the complex, interpersonal connections at play that can influence a deal.

Analyze potential future pipeline

Growing your relationship within an account comes down to understanding whitespace: the places where your customer's unmet needs and your products or services overlap. When you can see your whitespace, you know where to focus your attention and energy. ABS software can do the heavy lifting here, alerting sellers to the best areas of focus so they can invest their time and energy chasing the cross-and-upsell opportunities likeliest to bear fruit.

Opportunity planning

Your tech platform should support your deal strategy by guiding sellers through the steps they need to take while pursuing an opportunity. Think about your system less as a stand-in for methodology and more as a set of guardrails that help sellers bring it to fruition in their day-to-day lives. Your platform can prompt reps to think through qualifying questions, remind them to take particular actions, show them visual maps of their progress with key influencers, and more.



Coordinate collaboration

Perhaps the most important aspect of modern selling is that it's a team sport. Sellers who fail to work alongside their colleagues in marketing, customer success, solution consulting, product, and more, lose out on hugely valuable insights that can allow them to build trust and work toward a customer's goals. Without software, large-scale collaboration is nearly impossible. An ABS platform should allow everyone who touches the customer to share and exchange knowledge and work together to get the job done throughout the customer lifecycle.

But ABS software can't...

Replace methodology

Here's the part some sales leaders don't want to hear: Your ABS platform is not a stand-in for sales methodology. Technology can only enable strategic parameters that actually exist. You wouldn't buy a bunch of power tools and expect your house to be successfully remodeled without plans from a contractor. Similarly, you can't toss powerful software at sellers without helping the entire team follow your business's philosophical approach. Done right, your technology should be the tactical manifestation of your methodology, not a replacement for it.



Perhaps the most important aspect of modern selling is that it's a team sport.

28%

Only 28 percent of sales leaders say they are meeting their cross-selling and up-selling growth targets.

(Gartner)

3 key outcomes of ABS software



1. Close the gap between the what and the how of sales

The term “sales process” and “sales methodology” are often used interchangeably, but they’re quite distinct:

- Process is what you do. It’s a science.
- Methodology is how you do it. It’s an art.

A good ABS platform can help sellers connect the two so that they do the right thing, do it well, and be able to repeat that for every account on their target list. For example, a seller can be prompted not only that the next step in their process is to assess a potential deal with a deal review, but also get guidance to help them understand how they should go about structuring the exercise to maximize the value of the output.



2. Maximize customer lifetime value

The modern buying journey is episodic, not linear. This means that you have to understand what is happening at every point along the way. By establishing a hub for cross-functional collaboration, you’ll be far better positioned to:

- Maximize deal size by collaborating across the revenue team to understand relationships, objectives, and more.
- Identify upsell and cross-sell opportunities with shared insights about how your organizations can align and grow together.
- Retain customers by focusing on achieving their highest priority goals and maximizing their use of your products and services.



3. Let sellers sell

Great sellers excel at being human. They listen. They learn. They communicate. But as sales has become a more and more complex discipline, we’ve increasingly leaned on sellers to spend a large chunk of their time thinking like robots: inputting data, analyzing said data, calculating win rates, forecasting deal sizes, and more. Is it any wonder that getting most sellers to spend their time on tasks that are fundamentally unnatural for them can feel like pulling teeth?

ABS software should enable your sales team to get even more analytically advanced while simultaneously giving sellers their days back to do what they do best: be human to connect with and sell to other humans.

The next frontier: AI and beyond

We're in the midst of rapid (and major) innovation, thanks largely to the arrival of artificial intelligence, which will usher in a new era of insights and scale. Here's what's coming in the world of ABS:

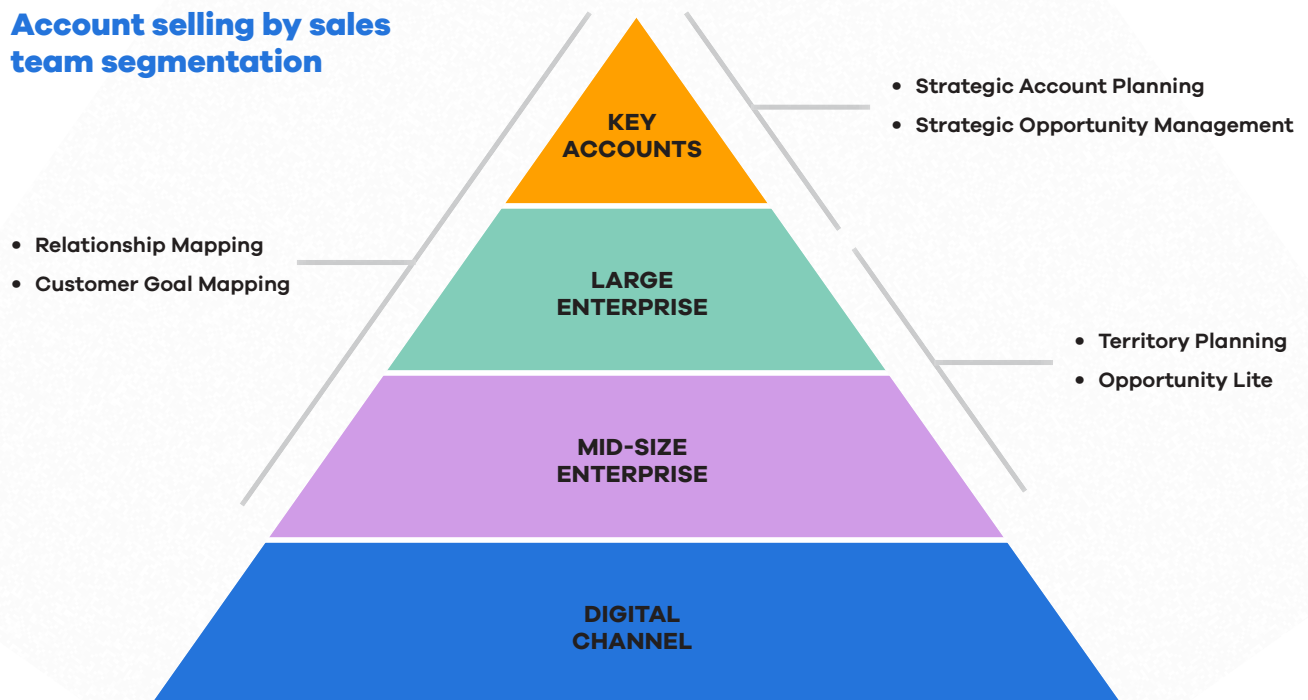
Artificial intelligence will offer a new era of insights. True, generative "artificial intelligence" hasn't reached account-based selling platforms just yet, but sophisticated augmented intelligence has—and it's already having an impact on the ability of revenue teams to put account planning to work.

AI will offer sellers a far wider range of insights, giving them unprecedented levels of knowledge about their customers and how best to serve them. The better these insights get, the more people will hurry to adopt technology as an essential component of maximizing customer value.

Account planning principles will expand beyond a select few accounts.

Traditionally, strategic account planning and opportunity management have been relegated to a handful of key accounts overseen by a small number of key revenue team members. We wouldn't expect the same level of planning from sellers who manage multiple accounts or a territory as we would from a seller who has only one or two, but organizations are increasingly scaling account planning best practices so that they fit many levels of the business.

Account selling by sales team segmentation





Enablement will be ongoing. Traditionally, sales training happened in sessions that spanned multiple days, throwing a ton of information at sellers before sending them back to their offices. But increasingly, companies are moving away from a firehose approach. Instead, they're offering initial training sessions on the basics of account planning and then shifting to a practice of real-time coaching and enablement—think of it like tutoring sessions—over the long term. This way, large groups of sellers can learn basic skills, while the most strategic sellers benefit from ongoing, one-on-one coaching and support.

The takeaway

More and more sales organizations are adopting account-based selling—and broadening the reach of its principles beyond the top few accounts. And ABS technology is right there with us, evolving to help our revenue teams rally more effectively around the needs of our customers. In the coming years, look out for the next wave of this evolution: more nuanced, data-driven insights accelerated by artificial intelligence that will help us create true customer centricity at scale.

We are Upland.

Build relationships, earn trust, and grow revenue

Win new deals, retain valuable customers, and grow revenue in strategic accounts with the tools your sellers need to translate winning account-based selling principles into day-to-day activities.

[See Altify in action](#)



uplandsoftware.com/altify

phone: +1 833-UPLAND-1 (875-2631)