



# How to Prioritize Your Territory

Nicole Drummond, Sales Development Manager,  
Demandbase

Ross Sanbrook, Enterprise SDR, Demandbase

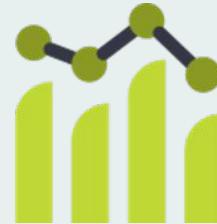
# What We'll Cover

- How to Prioritize Accounts
- Leveraging Journey Stages
- Account Engagement
- Salesforce Integration
- Outreach Integration
- Custom Dashboards

# How Demandbase Prioritizes Accounts



**QUALIFICATION SCORE**  
The likelihood of ever becoming a customer



**PIPELINE PREDICT**  
Highest propensity to become an opportunity in the next 30 days



**ENGAGEMENT MINUTES**  
Assign a point system for specific levels of engagement

# Journey Stages

- Where are your top accounts in their buyer's journey?
- Building block of your territory and prioritization
- Full customization to match your sales cycle

* MEMs = Mktg Engagement Minutes	
Journey Stages	Stages are showing Accounts with...
No Engagement	No engagement
Intent	Intent Surge or AWT in past month
Aware	Person has 5+ MEMs in past 3 months
Engaged	2 people w/ 10+ MEMs ea in past 3 months
MQA	100+ MEMs + 3 people @ least 20 MEMs
SQL Opportunity	Open SaaS opp in SQL or Discovery
Pipeline Opportunity	New Biz Stage 1-5 opp
Customer	Active SaaS customer
Customer Engaged	Cust w/ 1 person w/ 10+ MEM in past 3 months
Expansion Opportunity	SaaS customer w/ open SaaS upsell
Expansion Won	SaaS cust w/ open SaaS Upsell won in past month
Recycle	Lost SaaS opp in the past 3 months
Disqualified	Disqualified

# Journey Stages

**Analytics**

**Journeys**

Tenant: Demandbase (1681) Ross Sanbrook's Accounts Jun 10, 2023 Sep 10, 2023

Saved Filters Journey Stage Industry More Filters

Load Filter Please select... Please select... Please select... More Filters

Journey Summary

Hidden Stages: Hide

Stage	Accounts	Volume	Velocity	Conversion
All Other	120	12.0%	--	132 days 66.1%
Qualified	496	49.7%	35	77 days 64.2%
Aware	323	32.4%	352	40 days 11.5%
Interested	27	2.7%	53	28 days 27.1%
Engaged	23	2.3%	28	78 days 8.3%
MQA	9	0.9%	8	-- --
SQL Opportunity	--	0.0%	--	-- --
Pipeline Opportunity	--	0.0%	--	-- --
Customer	--	0.0%	--	-- --

**MQA**  
There were 9 accounts in Between 08.11.20 - 11.12.20

**Analytics**

**Journeys**

Tenant: Demandbase (1681) Ross Sanbrook's Accounts Jun 10, 2023 Sep 10, 2023

Saved Filters Journey Stage Industry More Filters

Load Filter Please select... Please select... Please select... More Filters

All Accounts

32 Accounts

Account Name (32)	CRM Owner	SDR Owner	Account Tier	Days in Journey	Top Qualification	Website
Greg Ruisi	Ross Sanbrook	Tier 4 (ICP)	99.0%	82	85.0%	http://pl.com
Greg Ruisi	Ross Sanbrook	Tier 2 (AE Top)	99.0%	290	75.0%	https://www.
Greg Ruisi	Ross Sanbrook	Tier 2 (AE Top)	99.0%	82	80.0%	https://www.
Greg Ruisi	Ross Sanbrook	Tier 4 (ICP)	90.0%	13	90.0%	https://www.
Greg Ruisi	Ross Sanbrook	Tier 5 (TAM)	84.0%	1	32.0%	https://www.
Greg Ruisi	Ross Sanbrook	Tier 3 (DBTAL)	80.0%	79	64.0%	www.tdcanal.
Greg Ruisi	Ross Sanbrook	Tier 4 (ICP)	73.0%	89	92.0%	http://www.n
Greg Ruisi	Ross Sanbrook	Tier 4 (ICP)	72.0%	63	63.0%	https://www.
Greg Ruisi	Ross Sanbrook	Not a Target	66.0%	13	90.0%	https://www.
Greg Ruisi	Ross Sanbrook	Tier 5 (TAM)	59.0%	0	71.0%	https://www.
Greg Ruisi	Ross Sanbrook	Tier 3 (DBTAL)	55.0%	83	55.0%	https://www.
Greg Ruisi	Ross Sanbrook	Not a Target	53.0%	83	54.0%	https://www.
Greg Ruisi	Ross Sanbrook	Tier 2 (AE Top)	53.0%	99	75.0%	scotiabank.c
Greg Ruisi	Ross Sanbrook	Not a Target	50.0%	188	85.0%	https://www.
Greg Ruisi	Ross Sanbrook	Tier 4 (ICP)	46.0%	27	89.0%	https://panci
Greg Ruisi	Ross Sanbrook	Tier 4 (ICP)	42.0%	220	87.0%	https://www.
Greg Ruisi	Ross Sanbrook	Tier 5 (TAM)	40.0%	7	74.0%	https://www.

**Top Pipeline...**

# Account Engagement

**Analytics**

**MAD-ENT-Hunter**

Tenant: Demandbase (1681) Jun 11, 2023 Sep 11, 2023

**Saved Filters** Load Filter More Filters

**Quick Cards**

- Trending or High Intent - Last 30 Days
- Unique Web Visits - Last 30 Days
- Newly Engaged People - Last 30 Days
- Most Engaged People with Marketing Activities - Last 30 Days

**Highlights**

- Attended OnDemand 2023-Q3-WBN-OD-Align-Sa... Visited 8 web pages
- Attended OnDemand 2023-Q3-WBN-OD-Align-Sa... Visited 5 web pages
- Attended OnDemand 2023-Q3-WBN-OD-Align-Sa... Visited 6 web pages

Manage Account Take Action

**Analytics**

**Engagement**

Tenant: Demandbase (1681) Jun 11, 2023 Sep 11, 2023

**Saved Filters** Load Filter More Filters

**Engagement Minute Trend**

Captured engagement - website page visits, trending intent keywords, known engagement.

Deal Story Engagement Group

Visited web page Responded: All Time demandbase

13 Top engagement minutes - Aug 22 - Aug 28

Top Activities Visit Web Page Visited web page. Trending Intent marketing automation Trending Intent display advertising

Top People

Engaged

Heatmap

**Analytics**

**Engagement**

Tenant: Demandbase (1681) Jun 11, 2023 Sep 11, 2023

**Saved Filters** Load Filter More Filters

**Heatmap**

Preset Custom Rows Name Columns MAS-Persona (Segment) Max Rows 10

	Sales - Executive	Marketing - Other	Anonymous People	General Executives	Marketing - Executive	Marketing - Sales - Other	Marketing - Digital and Web	Other	Marketing - Operations	Business - Operations
Totals	310	185	168	97	80	64	19	29	12	10
Stifel Financial Corp.	310	185	168	97	80	64	19	29	12	10

High Low

# Salesforce - Account

Demandbase Sales Intelligence Cloud

Account People Engagement Insights

### Technographics

#### 14 Technologies

- All
- CRM & Related (14)
- Office (17)
- Software Defined (1)
- ERP (8)
- E-Commerce (3)
- Business Services (3)
- Switches (1)
- HR (5)
- Marketing Services (5)
- Security (14)
- Servers (2)
- IT Infrastructure (40)
- Vertical Industry Soft... (9)
- Staffing Services (1)
- Digital Advertising (9)

#### CRM & Related

CRM Tools	Salesforce SPF
Web Technology	Jquery Validate
Customer Service Software	Cisco Unified Contact Center Express
	Fullstory
Marketing Software	Google Analytics
	Google Marketing Platform
	Google Tag Manager
	Marketo

Demandbase Sales Intelligence Cloud

Account People Engagement Insights

### Family Tree

#### 104 Accounts

Account Location

Employee Count

Revenue

Industry

Select All

Site data available

- CRM (St Louis, MO, United States) 400
- Baltimore, MD, United States
- Baltimore, MD, United States 9
- New York, NY, United States
- San Francisco, CA, United States

# Salesforce - People

▼ Demandbase Sales Intelligence Cloud

People

750 People Reset

Family Tree

750 Current 207 Former

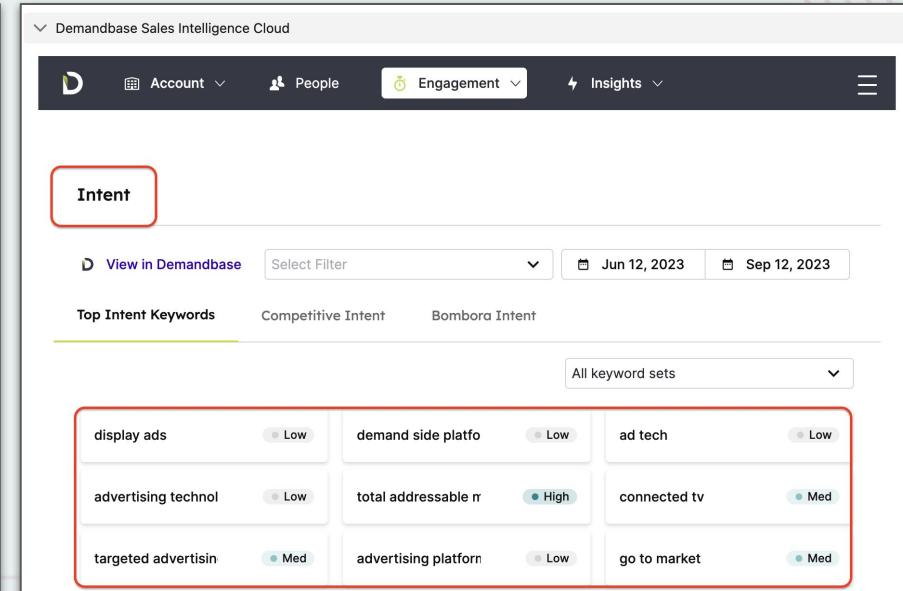
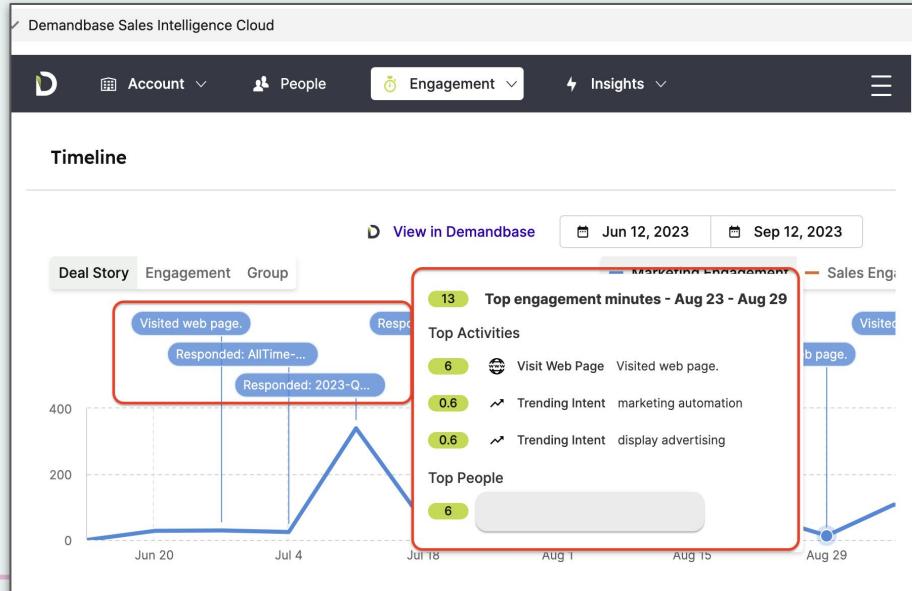
Job Function

- All
- Investment Manage... (2,597)
- Accounting and Finance (908)
- Sales (750)
- Operations (448)

Contacts (750) Contact Information

-  Managing Director/Investments, Sal...  
New York City, NY
-  Managing Director Institutional Equi...  
Minneapolis, MN
-  Managing Director, Institutional Sal...  
Cleveland, OH

# Salesforce - Engagement



# Salesforce - Insights

▼ Demandbase Sales Intelligence Cloud

D Account People Engagement Insights

Search

125 News in the last 90 days

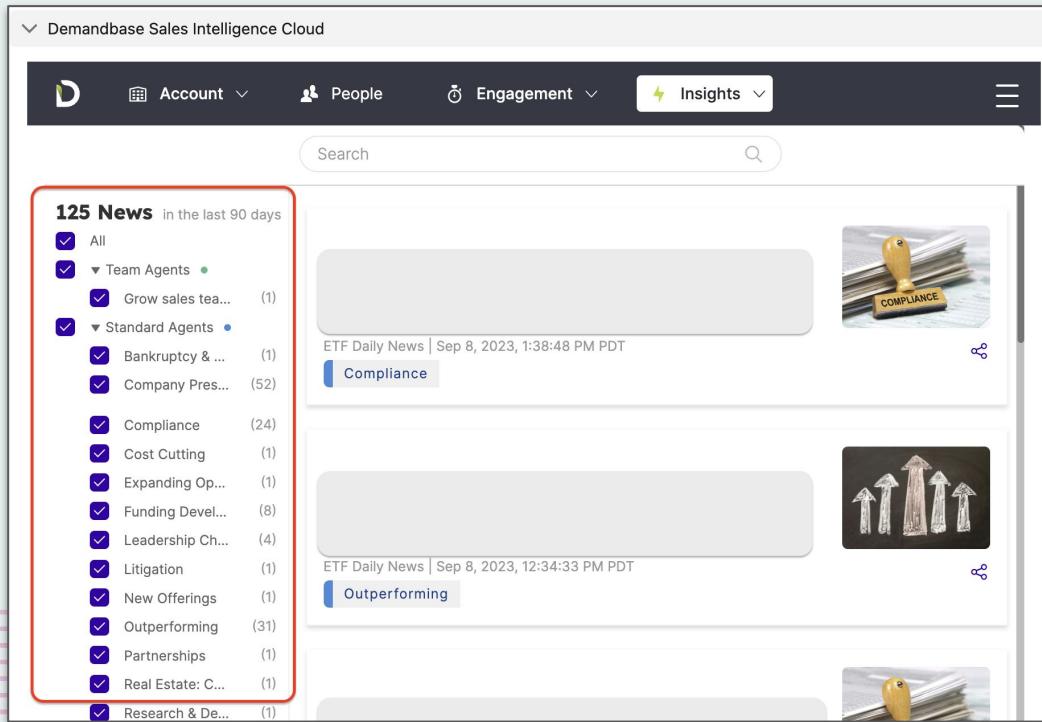
- All
- Team Agents
  - Grow sales tea... (1)
- Standard Agents
  - Bankruptcy & ... (1)
  - Company Pres... (52)
  - Compliance (24)
  - Cost Cutting (1)
  - Expanding Op... (1)
  - Funding Devel... (8)
  - Leadership Ch... (4)
  - Litigation (1)
  - New Offerings (1)
  - Outperforming (31)
  - Partnerships (1)
  - Real Estate: C... (1)
  - Research & De... (1)

ETF Daily News | Sep 8, 2023, 1:38:48 PM PDT

Compliance

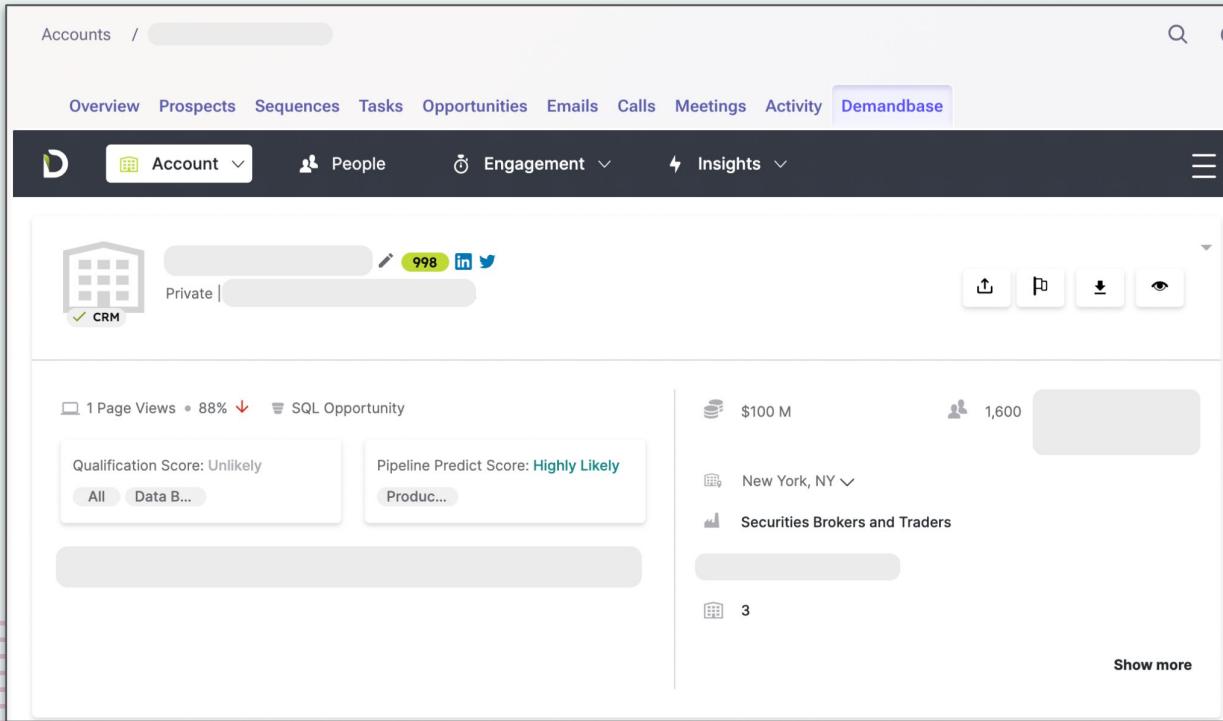
ETF Daily News | Sep 8, 2023, 12:34:33 PM PDT

Outperforming



The screenshot displays the Demandbase Sales Intelligence Cloud interface. The top navigation bar includes 'Account', 'People', 'Engagement', 'Insights' (highlighted in yellow), and a menu icon. A search bar is positioned above the main content area. On the left, a sidebar titled '125 News in the last 90 days' lists various news categories with checkboxes. A red box highlights the 'Standard Agents' section. The main content area shows two news cards: 'Compliance' news from Sep 8, 2023, and 'Outperforming' news from Sep 8, 2023. Each news card includes a timestamp, a category label, and a small thumbnail image.

# Outreach

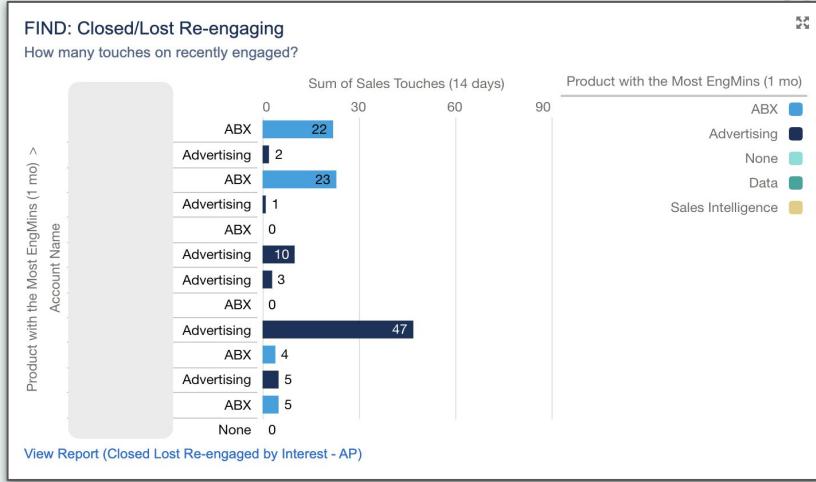
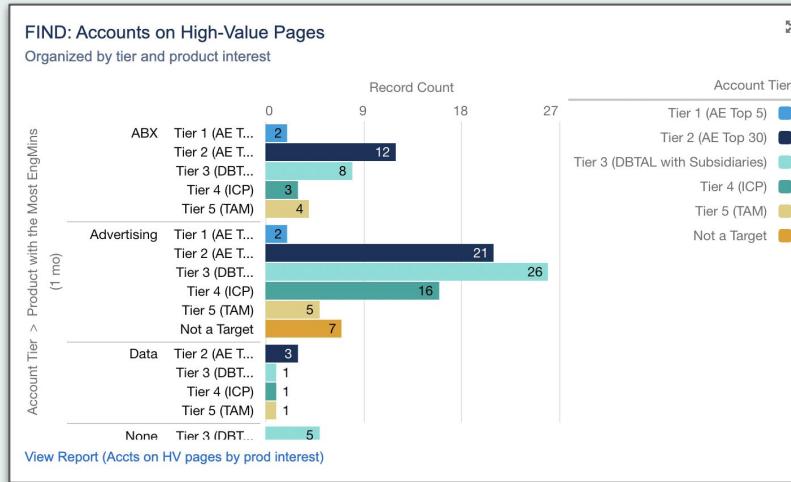


The screenshot shows the Demandbase software interface for managing accounts. The top navigation bar includes links for Overview, Prospects, Sequences, Tasks, Opportunities, Emails, Calls, Meetings, Activity, and Demandbase. The main content area displays an account profile for a SQL Opportunity. Key details shown include:

- Qualification Score:** Unlikely
- Pipeline Predict Score:** Highly Likely
- Engagement:** 998 (with LinkedIn and Twitter icons)
- Private:** CRM
- Page Views:** 1 Page Views (88% down)
- Opportunity Value:** \$100 M
- Team Size:** 1,600
- Location:** New York, NY
- Industry:** Securities Brokers and Traders
- Count:** 3

At the bottom right, there is a "Show more" button.

# Sales Leader Dashboard - Find

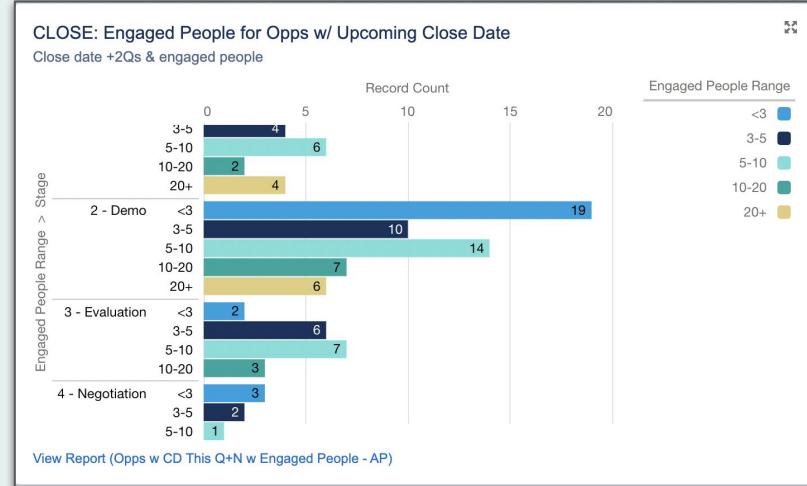


**FIND: Renewal Dates with Competitors**  
Utilize renewal date + interest & intent

Account Name	Renewal Date - ...	Product with the Most EngMins...	Marketing Engagement Minutes (1 ...	High Value Page Visits (3 mo.)	Intent 3mo - ABX Cloud	Intent 3mo - Competitive - ABX...
	10/2/2023	ABX	132	demandbase.com/product-tour/abx, demandbase.com/products/account-intelligence, demandbase.com/blog/2022-forrester-abm-tei-study	-	-
	10/2/2023	None	132	demandbase.com/products/advertising, demandbase.com/problems-we-solve/engage, demandbase.com/products/account-intelligence/company-information	predictive analytics, go to market	-
	10/2/2023	Sales Intelligence	132	demandbase.com/products/account-intelligence, demandbase.com/pricing, demandbase.com/products/advertising	go to market, predictive analytics, go to market strategies	bombora
	10/2/2023	ABX	115	demandbase.com/products/advertising, demandbase.com/book-meeting, demandbase.com/why-demandbase/6sense	predictive analytics	-

View Report (Competitor Renewal Date + Prod Interest)

# Sales Leader Dashboard - Close



**CLOSE: Opps w/ Competitive Intent**  
Be ready to fight off threats

Account Name	Qualificati...	Enga...	Marketing Engagement Min...	Marketing Engagement Min...	Intent 3mo - Competitive ...	Intent 3mo - Competitive...	Intent 3mo - Competitive - Si...	Intent 3mo - Competitive - Data Cloud
	98	27		482	2x bombora, 6sense, true influence	terminus, mediamat, techtarget	zoominfo, datafox, seamless ai	data management platform, datafox, clearbit
	98	22		186	442 bombora, lean data, true influence	terminus, mediamat, adroll	zoominfo, seamless ai, lusha	people data labs, data management platform, clearbit
	97	7		56	107 true influence, bombora	terminus, mediamat, techtarget	zoominfo	people data labs
	92	3		93	238 6sense, true influence	terminus, mediamat, techtarget	zoominfo, lusha, dun and bradstreet	people data labs, clearbit
	92	23		156	560 dark funnel	terminus, techtarget	zoominfo, seamless ai, bureau van dijk	data management platform, people data labs, clear bit
	92	2		64	207 bombora	terminus, mediamat, adroll	zoominfo, upload, slintel	data management platform
	92	23		308	613 lean data, 6sense	terminus, mediamat, techtarget	zoominfo, seamless ai	leadspace

View Report (Open Opps Showing Competitive Intent - AP)

# Sales Leader Dashboard - Expand

**EXPAND: Competitive Intent**  
Low engagement + competitive intent

Account Name	Account H...	La...	Engagement Minutes...	Intent 3mo - Competitive - A...
	55	7/25/	26	bombora
	60	9/17/	60	true influence
	43	7/27/	112	6sense
	60	9/11/	131	bombora
	60	8/9/2	168	true influence
	74	9/15/	218	bombora, evergage, true influence

[View Report \(ABX Cust w Competitive Intent - ENT GAD\)](#)

**EXPAND: Upsell Alert - ABX**

Account Name	Account Health ...	Intent 3mo - ABX Cloud	Intent 3mo - Competitive - AB...
	70	predictive analytics, go to market, go to market strategies	bombora, true influence
	70	go to market, predictive analytics, account based marketing	-
	68	go to market, predictive analytics, sales analytics	metadata io
	60	go to market, account insights	-

[View Report \(Non ABX Cust w ABX Intent - ENT GAD\)](#)

**EXPAND: Customers on High-Value Pages**  
Viewing content related to new products?

Account Name	High Value Page Visits (1 mo.)	Engagement Minutes (1 mo.) ↓	Sales Touches (1 mo.)
	demandbase.com/products/personalization, demandbase.com/products/advertising, demandbase.com/resources/case-study/tricentis-expands-relationship-with-demandbase-and-grows-bdr-pipeline-31	3k	157
	demandbase.com/resources/case-study, demandbase.com/products/account-intelligence, demandbase.com/why-demandbase/6sense	1k	38
	demandbase.com/book-meeting, demandbase.com/resources/ebook/2022-gartner-abm-magic-quadrant-thank-you, demandbase.com/products/advertising/ctv	938	22

[View Report \(ENT GAD Resources \(All\) Last 30\)](#)

# Thank you!