

# CAS & APRIL SIX

June 16, 2025

april  + CAS 



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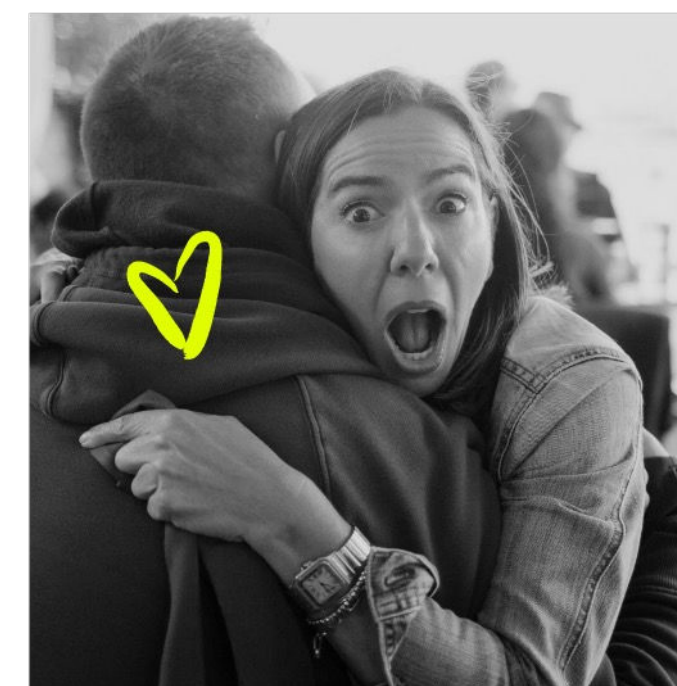
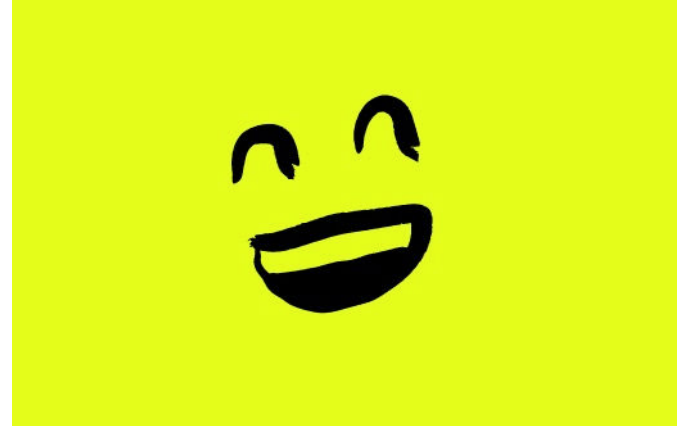
# OUTLINE

- A little about April Six
- What we heard from you
- How we think of ABM
  - Philosophy
  - Process, how we can help
- Work samples
- Discussion





**WE ARE  
A GLOBAL GROUP  
OF INDUSTRY  
SPECIALISTS  
CRAFTING MOMENTS  
THAT MATTER FOR  
BRANDS SHAPING  
THE FUTURE.**





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# BRANDING + WEB REFRESH

Built-to-last brands applied to customer-centric web experiences that drive measurable action.

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# ABM PROGRAMS

Designing 1:1, 1:few, and 1:many strategies and activating programs into market through intent-led media.

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# BRAND CAMPAIGNS

Activating brand stories by creating moments to spark new audience engagement and awareness.

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# MEDIA + REPORTING

Planning, buying, and reporting on paid media across search, social, display, content syndication, direct buys, CTV, and OOH.

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# DEMAND CAMPAIGNS

Single- or multi-campaign demand generation strategies to capture and qualify leads for sales team follow-up.

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# CONTENT DEVELOPMENT

Video to infographic, short- and long-form content to educate and inspire audiences.







# WE HELP GTM LEADERS BRIDGE BUSINESS STRATEGY AND MARKETING EXECUTION

How? By integrating the capabilities of a management consultancy and a marketing agency—all underpinned by analytics, data and technology, and all under one roof. Net result: Accelerated performance. Zero signal loss from strategy through execution.

Our client focus > Brands in complex markets:











































300<sup>+</sup>

Expert teammates

4

Integrated services

6

NA & UK locations

6

Key industries



# WHAT MAKES THIS PROJECT UNIQUE

## Current :

- CAS is looking to expand into professional services and is launching a Biology segment in addition to the existing Chemical segment
- Current ABM campaigns has been running well with great reach
- Currently targeting 91 strategic accounts with sub segments defined based on intent and activity

## Looking for an agency partner to:

Augment current CAS marketing team to help manage ABM programs. Agency role would include:

- Campaign set-up
- Creative execution
- Sales alignment
- Campaign reporting & optimization

## Considerations:

- Systems and tools are in place – SFDC will be connected to Demandbase in 60 days





april 6

# ABM PHILOSOPHY



# ABM ENGINE: THE APRIL SIX FLYWHEEL

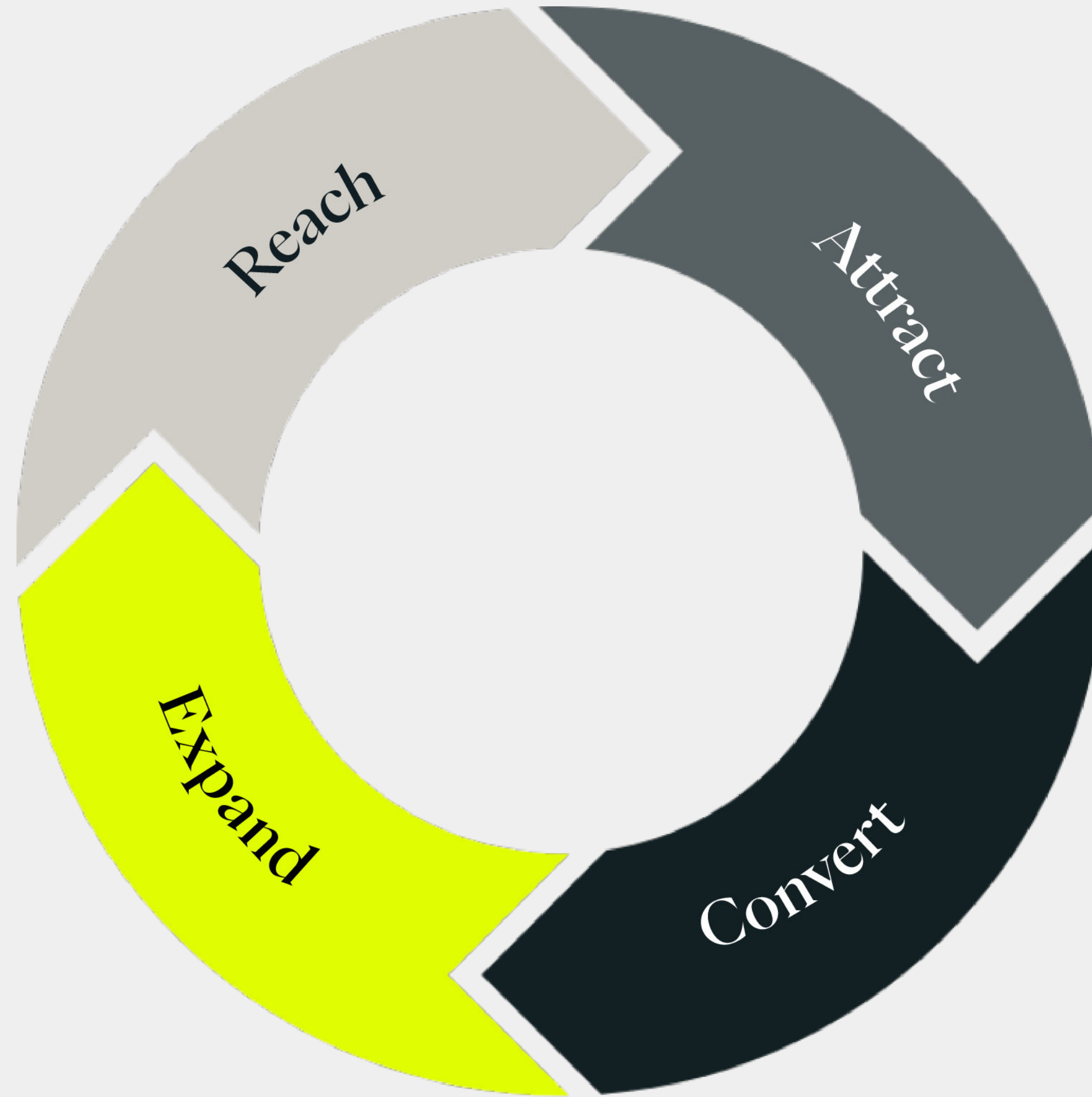
Continuously rotating to achieve the 4 objectives account-based growth

## 1. REACH

Connect and provide air cover to build relevancy within accounts. Includes both new buying groups in existing accounts and the initial marketing contact with net-new accounts.

## 4. EXPAND

Personalize the account onboarding, excel with product/service, and incentivize advocacy to fuel extended reach, cross sell, and upsell.



## 2. ATTRACT

Entice intent-rich accounts or hand raisers to make meaningful contact with the brand. As measured by account engagement, align to solution areas to account behaviors.

## 3. CONVERT

Build credibility within the account, broaden contact knowledge in the buying group, build consensus across the buying team, and convert the sale.

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## SEGMENTS

True ABM starts with identifying ideal customer profiles to build meaningful segments that can be activated. These can be static built from internal data and insight or dynamic based on external intent trends and engagements.

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## ACCOUNT INSIGHTS

While we select accounts based on their value to the brand, we go-to-market biased for resonance with the audience. The best ABM programs are tailored to insights around your account segments, industry, tech footprint, or similar.

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## CREATIVITY IN YOUR ABM

It's easy to get lost in the technology. It's crucial, but a creative angle, relevant messaging, and valuable content is critical to helping you stand out in the crowd.



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# ALIGNMENT

Commitment from sales and marketing teams around the new go-to-market motion



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# GTM APPROACH

Agreement on ICPs, clustering of accounts, and target account lists



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# UNIQUE WAY IN

Identification of account insights based on customer behaviors and experience



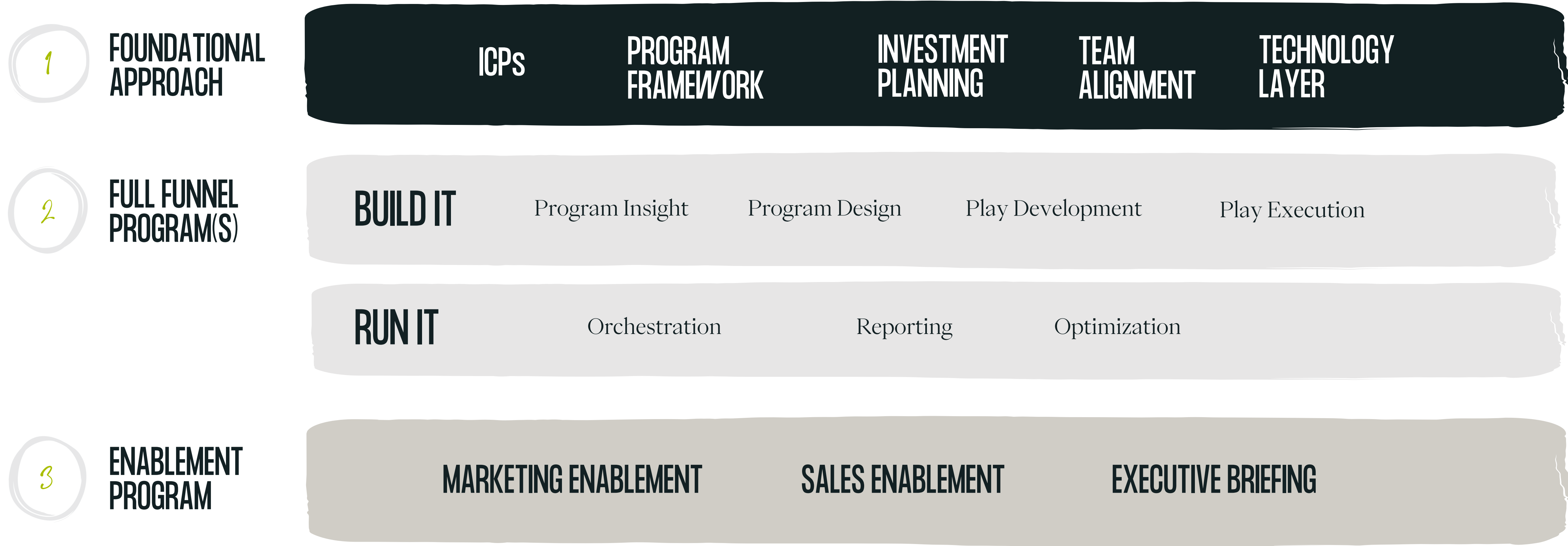
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# PERSONALIZATION

Customized programs, designed as a series of marketing and sales “plays”

# HOW WE WORK WITH CLIENTS

Continuously rotating to achieve the 4 objectives account-based growth







A TAILOR-MADE PROPOSAL ON HOW LOWE'S CAN:

# Build Revolutionary Customer Experiences Cost-Effectively and at Scale

Discover the power of feature management



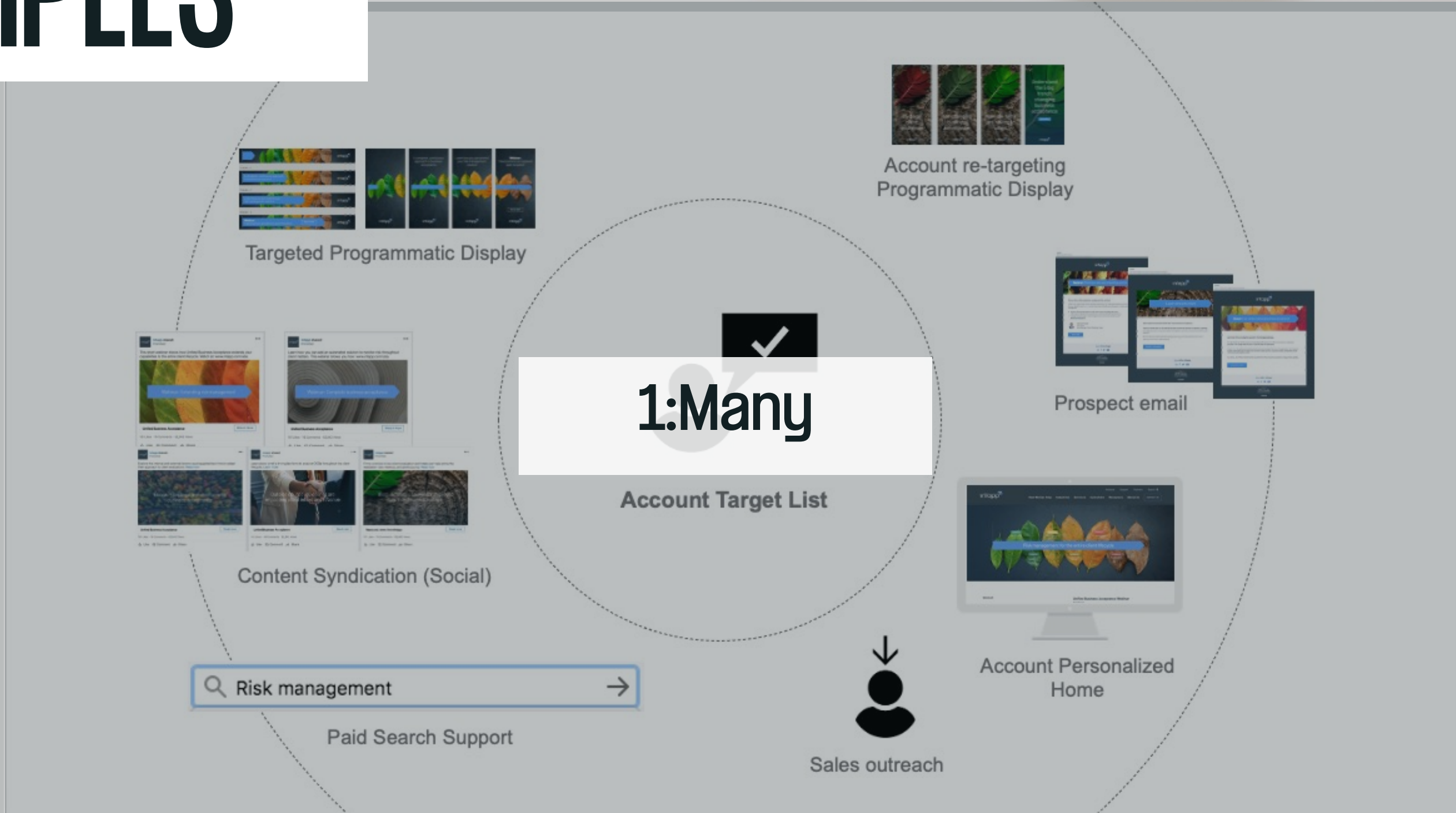
1:Few



## EXAMPLES



1:Many



1:Many



# WORK SAMPLE LUMEN CASE STUDY



# LUMEN REDEFINING ABM SUCCESS

LUMEN®

The essential guide  
to building the  
store of the future

How retailers can lay the  
foundation for a truly unified  
in-store digital strategy.





LUMEN

# Upgrade your digital transformation strategy

7 answers to help you  
successfully adopt new  
technologies



## THE CHALLENGE

Lumen , a global enterprise technology brand came to April Six with the ask to **accelerate their adoption** of ABM, with the long-term goal of running an account-based strategy at scale across their entire marketing organization.

The company wanted to more accurately target and convert new customers. Lumen’s current demand generation campaign model and infrastructure was performing sub optimally—and particularly struggled to capture intent across wider, harder-to-reach buying groups.

The company also needed to solve for the impact of these changes on its teams, technology stack, marketing language they use, KPI set, and mechanisms for reporting success.



# THE OBJECTIVE

The objective was two-fold:

- 1) Create a strategic sales and marketing 1:1 ABM program that accurately targets, attracts, and drives prospects through the funnel, and...
- 2) Successfully train Lumen’s sales and marketing teams to self-manage the program.

## ENGAGEMENT ON A PAGE



# ESTABLISHING INVESTMENT MODEL



# PHASE 1 PROJECTIONS

ASSUMPTIONS	BASE	MOD	GOAL
Average Opportunity Value (by month)	\$█k	\$█k	
Two Year Enterprise Customer Value	\$█M	\$█M	
Marketing ROI expectation	4	4	
Opp Close Conversion	36%	36%	0%
SQL to Opp Conversion	100%	100%	0%
MQL to SQL Conversion	62%	62%	0%
Lumen warm lead to MQL conversion	6%	12%	103%
In market account to lead in database conversion (6sense benchmark)	37%	37%	0%
In market accounts conversion	10%	10%	0%

PROJECTIONS	BASE	MOD	REAL (1 & 2)
Marketing budget	\$█M	\$█M	\$█M
Revenue goal	\$█M	\$█M	\$█M
Close Won Opps Required	6	6	4
Opportunities Needed	17	17	11
SQL's required (qualified accounts)	17	17	11
MQL (qualified accounts)	27	27	18
In-market accounts required	462	228	150
Total Accounts (Qualified for Cluster)	1248	612	260
Total Accounts (Needed/Meeting Qualifying Criteria)	4618	2282	1176

Improvements  
required





Qualified account KPI tracking

# BUDGETING MODEL

- Budget allocation
- Marketing assumptions by cluster
- Goals / KPI benchmarks
- Budget breakdown
- Production / Media max spend calculation

6,645,500								
Allocation formula								
nts	MRR	2 year CLV	TAM Total Value	Percentage allocation	Budget allocation	Suggested modifications	2024 Budget	Notes
250	\$ 75,000	\$ 1,800,000	\$ 450,000,000	32%	\$2,120,904		\$1,700,904	The allocation formula is a v onna are considered max counts. wh clusters have been partially eat fund the remaining clusters l v rationalize this with PoRev we
250	\$ 75,000	\$ 1,800,000	\$ 450,000,000	32%	\$2,120,904		\$1,700,904	
50	\$ 75,000	\$ 1,800,000	\$ 90,000,000	6%	\$424,181		\$424,181	
150	\$ 25,000	\$ 600,000	\$ 90,000,000	6%	\$424,181		\$674,181	
150	\$ 25,000	\$ 600,000	\$ 90,000,000	6%	\$424,181		\$674,181	
500	\$ 10,000	\$ 240,000	\$ 120,000,000	9%	\$565,574		\$735,574	
500	\$ 10,000	\$ 240,000	\$ 120,000,000	9%	\$565,574		\$735,574	
-	\$ 10,000	\$ 240,000	\$ -	0%	\$0		\$0	
1,850			\$ 1,410,000,000		\$6,645,500		\$6,645,500	
One to few clusters								
Cluster 1	Cluster 2	Cluster 3	Cluster 4	Cluster 5	Cluster 6	Cluster 7	Cluster 8	
etail and aurants	LE - Finance and Banking	LE - Technology adoption	Public sector FED/SLED HLC	Public sector Public Administration + Higher Education	Mid-market - Tech Laggards	Mid-market - Expansion (quarterly dynamic)	Mid-market - Network new logo	
75,000	\$ 75,000	\$ 75,000	\$ 25,000	\$ 25,000	\$ 10,000	\$ 10,000	\$ 10,000	1. Assumptions are used to inform goal f 2.MRR provided by Lumen, note we have Should consider calibration 3.Major goal / change is the Lumen Warn the ABM campaigns.
1,800,000	\$ 1,800,000	\$ 1,800,000	\$ 600,000	\$ 600,000	\$ 240,000	\$ 240,000	\$ 240,000	
36%	36%	36%	57%	57%	36%	36%	36%	
100%	100%	100%	100%	100%	100%	100%	100%	
65%	65%	65%	62%	62%	62%	62%	62%	
16%	16%	16%	16%	16%	16%	16%	16%	
57%	57%	57%	57%	57%	57%	57%	57%	
22%	22%	22%	22%	22%	22%	22%	22%	
One to many clusters								
630,000	\$ 630,000	\$ 630,000	\$ -	\$ -	\$ -	\$ -	\$ -	1.Goal formulas build pipeline goals for e represent a 2024 goal. A separate model 2.The MQA line-item is a sanity check aga projected in the account list, then we will budget, or take a goal to further improve
1,700,904	\$ 1,700,904	\$ 424,181	\$ 674,181	\$ 674,181	\$ 735,574	\$ 735,574	\$ -	
75,000	\$ 75,000	\$ 75,000	\$ 25,000	\$ 25,000	\$ 10,000	\$ 10,000		
11,654,521	\$ 11,654,521	\$ 5,270,904	\$ 3,370,904	\$ 3,370,904	\$ 3,677,872	\$ 3,677,872	\$ -	
6	6	3	6	6	15	15	0	
18	18	8	10	10	43	43	0	
18	18	8	10	10	43	43	0	
28	28	13	16	16	69	69	0	
173	173	78	99	99	429	429	0	1. Full budget builds a breakdown based 2. DMs are used in downstream media pl 3. Average Spend Per is built up from exi represents a "reasonable" budget (not m difference. These spend levels need more from a reach/frequency model based on with this model from other clients. 4. Paid media (row 48) is a variable field full budget line-item 41. Projected media which means we will need to stretch the l
303	303	137	174	174	753	753	0	
1379	1379	624	792	792	3422	3422	0	
1,700,904	\$ 1,700,904	\$ 424,181	\$ 674,181	\$ 674,181	\$ 735,574	\$ 735,574	\$ 3,600,000	
250	250	50	150	150	500	500	1,400	
9	9	9	9	9	9	9	6	
2,250	2,250	450	1,350	1,350	4,500	4,500	8,400	
\$300	\$675	\$675	\$500	\$500	\$200	\$200	\$200	
11	11	10	10	10	10	10	10	
\$825,000	\$1,856,250	\$337,500	\$750,000	\$750,000	\$1,000,000	\$1,000,000	\$2,800,000	
830,000	\$ 850,000	\$ 475,000	\$ 600,000	\$ 600,000	\$ 700,000	\$ 700,000	\$ 2,800,000	
265,600	\$ 272,000	\$ 152,000	\$ 282,000	\$ 282,000	\$ 294,000	\$ 294,000	\$ 756,000	



## Qualified account KPI tracking

# PROJECTION FORECASTING

- Marketing Qualified Accounts
- Sales Qualified Accounts (SQAs)
- SQAs with opportunities
- Closed-won opportunities (with time delay)
- Sales
- In year-revenue

these assume the larger quantities in the TALs																
As (cumulative)	2023				2024											
h time delay	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Retail & Restaurant		18.6	55.8	93.1	100.5	111.7	126.6	145.2	167.5	186.1	201	212.2	223.4	230.8	238.3	242
Finance & Banking		18.7	56	93.4	101.1	112.7	128.2	147.5	170.7	190	205.5	217.1	228.7	236.4	244.1	248
Tech Adopt (Qtrly Dyn)			63.3	158.1	162.7	169.6	178.8	190.3	204.1	215.5	224.7	231.6	238.5	243.1	247.7	250
olic: FED/SLED HLC					7.1	17.6	31.7	49.4	70.5	88.1	102.2	116.3	130.4	134	137.5	141
olic: Pub Admin & HiEd					7.1	17.8	32	49.7	71	92.3	103	113.6	124.3	132.8	137.7	141.3
A: Tech Laggards					61.3	153.2	275.7	428.9	612.8	765.9	888.5	980.4	1072.3	1133.6	1194.9	1225.5
A: Expansion (Qtrly Dyn)					67	167.4	301.4	468.8	669.8	837.2	971.1	1071.6	1172.1	1239	1306	1339.5
As (cumulative)	2023				2024											
h time delay	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Retail & Restaurant			9.3	27.9	46.5	50.2	55.8	63.3	72.6	83.8	93.1	100.5	106.1	111.7	115.4	119.1
Finance & Banking			9.3	28	46.7	50.6	56.4	64.1	73.8	85.3	95	102.7	108.5	114.3	118.2	122.1
Tech Adopt (Qtrly Dyn)				31.6	79.1	81.4	84.8	89.4	95.1	102	107.8	112.4	115.8	119.3	121.6	123.9
olic: FED/SLED HLC						4.2	10.6	19	29.6	42.3	52.9	61.3	69.8	78.3	80.4	82.5
olic: Pub Admin & HiEd						4.3	10.7	19.2	29.8	42.6	55.4	61.8	68.2	74.6	79.7	82.6
A: Tech Laggards						30.6	76.6	137.9	214.5	306.4	383	444.2	490.2	536.2	566.8	597.4
A: Expansion (Qtrly Dyn)						33.5	83.7	150.7	234.4	334.9	418.6	485.6	535.8	586	619.5	653
As with Opptys (cumulative)	2023				2024											
h time delay	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Retail & Restaurant				5.8	17.3	28.8	31.1	34.6	39.2	45	51.9	57.7	62.3	65.8	69.2	71.5
Finance & Banking				5.8	17.4	28.9	31.3	34.9	39.7	45.7	52.9	58.9	63.7	67.3	70.9	73.3
Tech Adopt (Qtrly Dyn)					19.6	49	50.4	52.6	55.4	59	63.2	66.8	69.6	71.8	73.9	75.3
olic: FED/SLED HLC									2.8	7	12.6	19.7	28.1	35.1	40.7	46.4
olic: Pub Admin & HiEd								2.8	7.1	12.7	19.8	28.3	36.8	41	45.3	49.5
A: Tech Laggards							21.5	53.8	96.9	150.8	215.4	269.2	312.3	344.6	376.9	398.5
A: Expansion (Qtrly Dyn)							23.5	58.9	105.9	164.8	235.4	294.3	341.4	376.7	412	435.6
sed-won opptys (cumulative)	2023				2024											
h time delay	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Retail & Restaurant					2.4	7.1	11.8	12.8	14.2	16.1	18.4	21.3	23.7	25.5	27	28.4
Finance & Banking					2.4	7.1	11.9	12.8	14.3	16.3	18.7	21.7	24.1	26.1	27.6	29.1
Tech Adopt (Qtrly Dyn)						8	20.1	20.7	21.6	22.7	24.2	25.9	27.4	28.6	29.4	30.3
olic: FED/SLED HLC														1.5	3.9	7
olic: Pub Admin & HiEd												1.6	3.9	7	10.9	15.6
A: Tech Laggards								5.2	12.9	23.3	36.2	51.7	64.6	75	82.7	90.5
A: Expansion (Qtrly Dyn)							64.6	5.7	14.1	25.4	39.6	56.5	70.6	81.9	90.4	98.9
es (cumulative)	2023				2024											
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Retail & Restaurant					\$177.40	\$532.10	\$886.80	\$957.80	\$1,064.20	\$1,206.20	\$1,383.60	\$1,596.50	\$1,773.90	\$1,915.90	\$2,022.30	\$2,128.80
Finance & Banking					\$178.00	\$534.00	\$890.00	\$963.70	\$1,074.20	\$1,221.50	\$1,405.70	\$1,626.70	\$1,810.90	\$1,958.20	\$2,068.70	\$2,179.20
Tech Adopt (Qtrly Dyn)						\$602.80	\$1,506.90	\$1,550.70	\$1,616.40	\$1,703.90	\$1,813.40	\$1,944.70	\$2,054.10	\$2,141.70	\$2,207.40	\$2,273.00
olic: FED/SLED HLC														\$38.60	\$96.60	\$173.80
olic: Pub Admin & HiEd												\$38.90	\$97.30	\$175.10	\$272.30	\$389.00
A: Tech Laggards								\$103.40	\$258.50	\$465.30	\$723.70	\$1,033.90	\$1,292.40	\$1,499.20	\$1,654.30	\$1,809.30
A: Expansion (Qtrly Dyn)								\$113.00	\$282.50	\$508.50	\$791.10	\$1,130.10	\$1,412.60	\$1,638.60	\$1,808.10	\$1,977.60
ear revenue (cumulative)	2023				2024											
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Retail & Restaurant							\$177.40	\$709.40	\$1,596.20	\$2,554.00	\$3,618.20	\$4,824.30	\$6,207.90	\$7,804.40	\$9,578.30	\$11,494.20
Finance & Banking							\$178.00	\$712.00	\$1,602.00	\$2,565.70	\$3,639.90	\$4,861.40	\$6,267.10	\$7,893.80	\$9,704.70	\$11,662.90
Tech Adopt (Qtrly Dyn)								\$602.80	\$2,109.70	\$3,660.40	\$5,276.70	\$6,980.60	\$8,794.00	\$10,738.70	\$12,792.80	\$14,934.50
olic: FED/SLED HLC																\$38.60
olic: Pub Admin & HiEd														\$38.90	\$136.20	\$311.20
A: Tech Laggards										\$103.40	\$361.90	\$827.10	\$1,550.90	\$2,584.80	\$3,877.20	\$5,376.30
A: Expansion (Qtrly Dyn)										\$113.00	\$395.50	\$904.10	\$1,695.10	\$2,825.20	\$4,237.80	\$5,876.40

# ALIGNING OUR CLUSTERS



Build it

april6

# GATHERING PROGRAM INSIGHTS

## ABM WORKSHOP

- **Account Selection and Segmentation:**  
Provide guidance in identifying high-potential target accounts and segmenting them effectively.  
Foster knowledge sharing and provide best practices for robust account profiling and segmentation.
- **Sales and Marketing Alignment:**  
Facilitate productive collaboration and mutual understanding between sales and marketing teams.
- **Strategic Action Plan:**  
Set specific goals, delegate responsibilities, and establish realistic timelines for successful execution.  
Establish the key plays to pay off the uncovered imperatives to lead to achieve goals.



# CREATING A RELATIONSHIP BETWEEN ACCOUNTS

Looking for impactful connective tissue between a variety of businesses

- **Industry or Vertical:** Common challenges and regulations within sectors.
- **Company Size:** Tailoring for SMBs, mid-market, or enterprises.
- **Technographic Data:** Shared technology platforms or tools.
- **Geographic Location:** Region-specific nuances and regulations.
- **Buying Stage:** Tailoring content based on the buying cycle.
- **Intent Data:** Insights indicating an account's purchase intent.
- **Challenges and Pain Points:** Shared problems or needs across accounts.

## SELECTION TOOLS





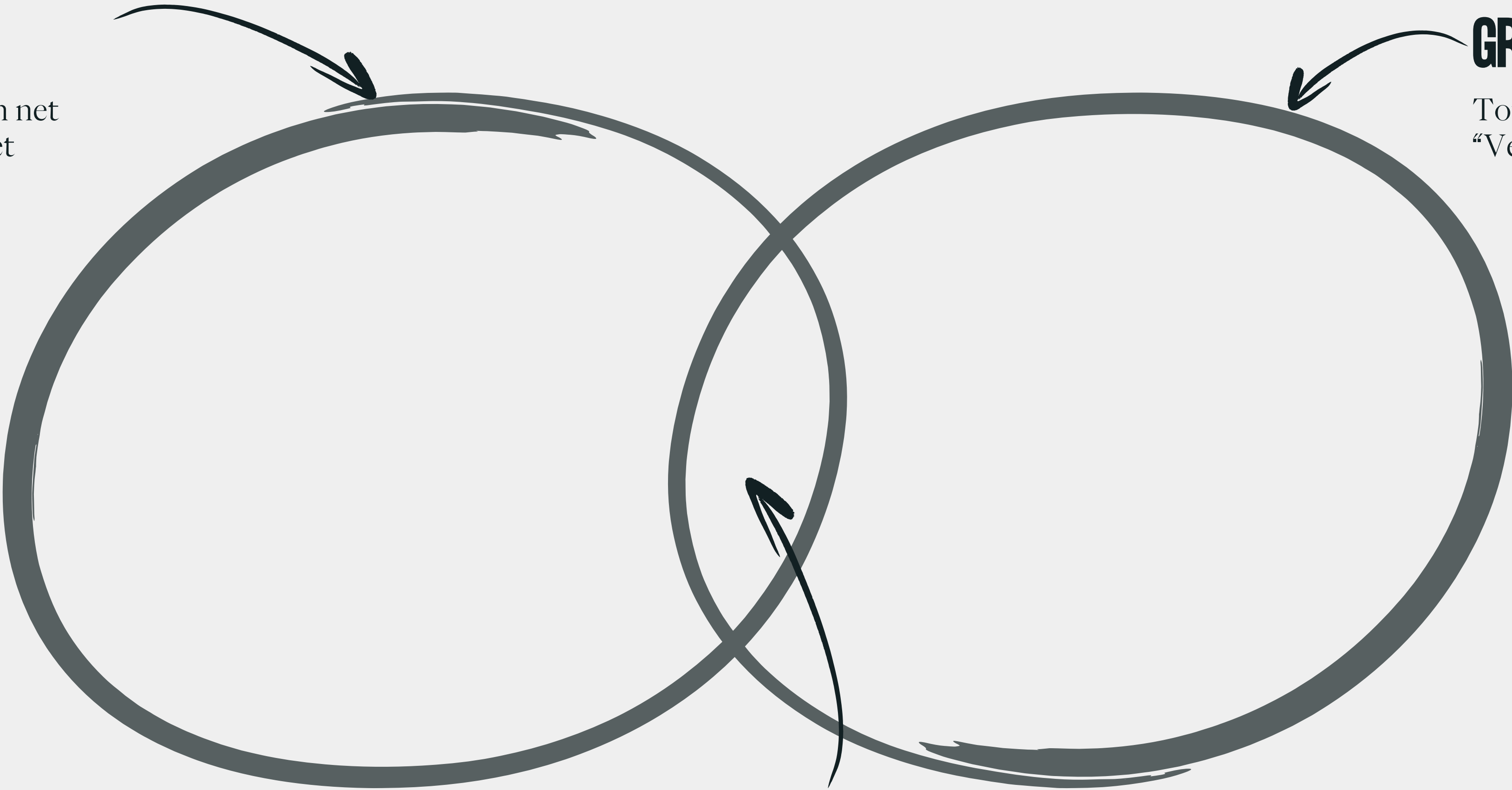
# VERTICAL AND ACCOUNT SELECTION

## ON-NET LOC %

Percentage of average on net locations versus s Off Net Locations.

## GROWTH PROPENSITY

Total Percentage of “High” to “Very High”



## INDUSTRY SELECTION

High value accounts and industries for consideration.

VERTICALS	ON–NET LOC %	AVG # of LOC PER ACCOUNT	GROWTH PROPENSITY HIGH OR VERY HIGH %	TOTAL ACCOUNTS	TOTAL HIGH OR VERY HIGH ACCOUNTS
Manufacturing	25.1%	237	33.8%	1044	353
Business Services	39.7%	308	31.8%	928	295
Finance	34.9%	593	40.4%	722	292
Hospitals & Physicians Clinics	27.2%	536	42.7%	492	210
Software	47.5%	111	32.7%	529	173
Insurance	37.6%	206	42.9%	359	154
Retail	19.6%	753	33.7%	454	153
Hospitality	30.0%	312	34.4%	369	127
Energy, Utilities & Waste	27.3%	368	43.6%	282	123
Media & Internet	42.2%	315	33.5%	346	116
Transportation	23.8%	488	33.5%	197	66
Construction	33.5%	238	35.5%	169	60
Holding Companies & Conglomerates	31.2%	442	41.0%	144	59
Healthcare Services	26.4%	350	53.3%	105	56
Real Estate	44.2%	296	44.0%	109	48
Consumer Services	28.3%	762	27.3%	132	36
Telecommunications	42.7%	151	16.0%	187	30
Organizations	18.3%	668	29.6%	81	24
Minerals & Mining	37.9%	142	39.1%	23	9
Law Firms & Legal Services	57.7%	203	19.6%	46	9
Government	17.3%	99	18.4%	38	7
Education	27.6%	267	16.0%	25	4

**Bolded** = existing verticalization of campaign / marketing content



# CORRELATED RECENT ADOPTION TECH FOOTPRINT WITH LATE-STAGE OPP

**DIGITAL TRANSFORMATION  
CONSULTING**

e.g., Point B Consulting, CGI, Capgemini

**ENDPOINT  
MANAGEMENT**

e.g., Ivanti

**APPLICATION /  
CONTAINER MGMT**

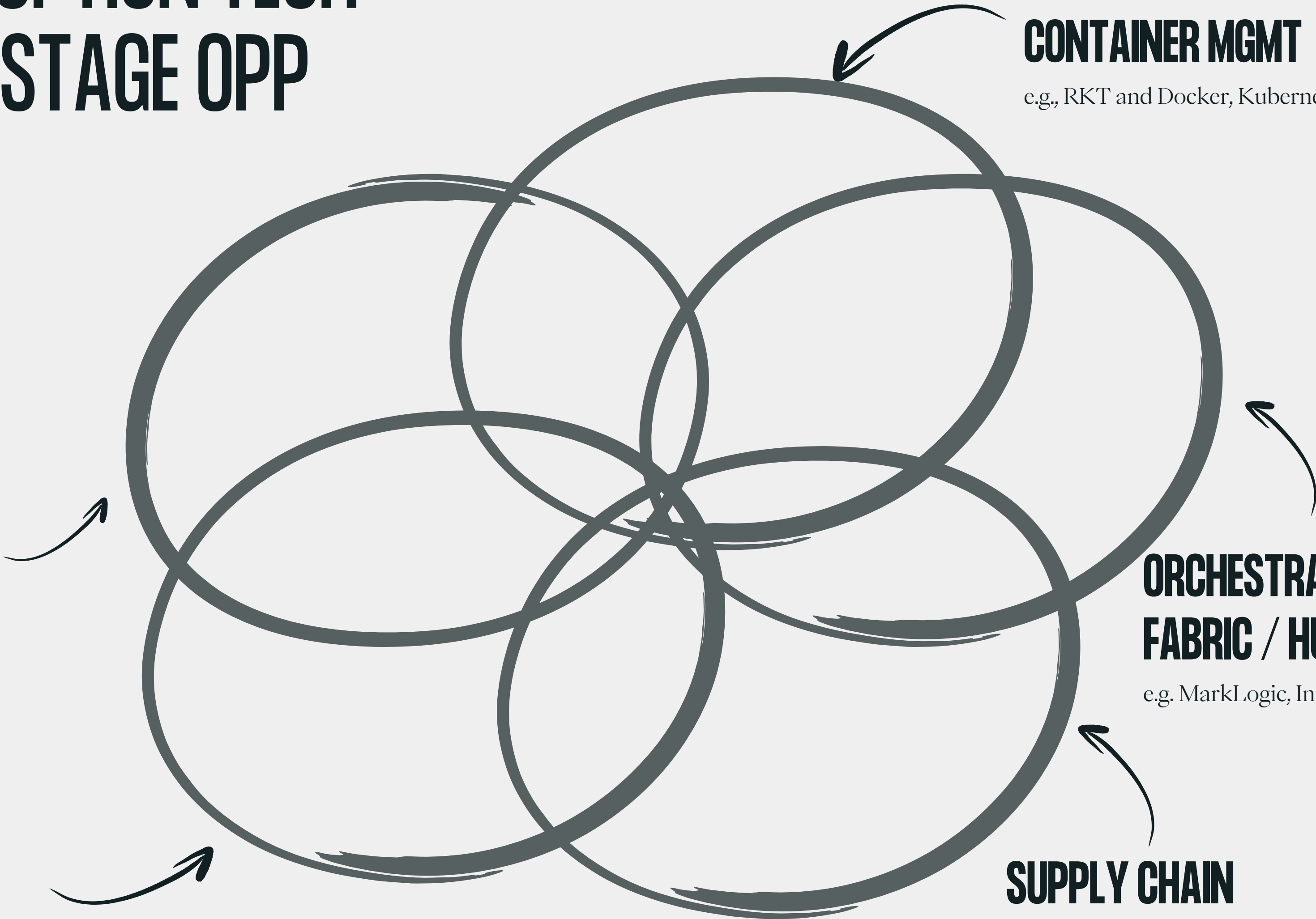
e.g., RKT and Docker, Kubernetes

**ORCHESTRATION DATA  
FABRIC / HUB**

e.g., MarkLogic, Informatica

**SUPPLY CHAIN  
MANGEMENT**

e.g., O9 Solutions, Promena



# ACCOUNT BASED MARKETING CLUSTER PRIORITIZATION

We recommended three initial clusters for the first engagement. Two focused on specific industries supported by existing marketing motions, and a third industry agnostic cluster to focus on a high growth area (security services) for Lumen. These three clusters allow for a variety of testing motions to take place (industry, service, solutions) and will provide needed in-market performance to prioritize additional clusters for ongoing ABM efforts.

Cluster 1	Cluster 2	Cluster 3	Cluster 4 (backup)
<div>Banking and Finance Industry</div> <div><ul style="list-style-type: none"><li>• Banks &amp; Investment Banks: Large scale with international reach, specialized services.</li><li>• Asset Management &amp; Specialty Finance: Broad investment services, including credit unions and private equity.</li></ul></div>	<div>Retail industry</div> <div><ul style="list-style-type: none"><li>• Enterprise organizations, technology firms, financial institutions, and any organization prioritizing robust cybersecurity measures.</li><li>• Organizations actively investing in key cyber security solutions (e.g. Fortinet, F5, VMware, etc)</li></ul></div>	<div>Industry agnostic</div> <div><ul style="list-style-type: none"><li>• Enterprise organizations, technology firms, financial institutions, and any organization prioritizing robust cybersecurity measures.</li><li>• Organizations actively investing in key cyber security solutions (e.g. Fortinet, F5, VMware, etc)</li></ul></div>	<div>Healthcare Industry</div> <div><ul style="list-style-type: none"><li>• Hospitals, medical centers, clinics, and healthcare networks.</li><li>• Include both public and private healthcare institutions.</li></ul></div>



# AUDIENCE, THEMES, AND SOLUTIONS

# TARGET AUDIENCE

The campaign focused on a diverse set of internal and external audiences that aligned with Lumen's strategic priorities.

Externally, the campaign targeted three primary audience segments: **public sector**, **mid-market**, and **large enterprise**. Within public sector, we engaged IT decision-makers, security professionals, and C-suite executives from federal, state, and local government healthcare and public administration organizations. For mid-market, we honed in on tech-laggard companies in need of communications and networking solutions—while also cross-selling to customers seeking security and application migration. Large enterprise efforts focused on retail, finance, and technology sectors, engaging businesses undergoing digital transformation, modernizing legacy systems, or seeking application modernization.





CLUSTER	BUSINESS CHALLENGES	LEAD PERSONAS	SOLUTION ALIGNMENT
Finance	Creating omnichannel experiences + Branch strategies	CTO + DX + CX + IT + Branch Managers	Network / Security / UCC
	Building a Smart Network	CIO + network buyers	Networking
	Enhancing Security and Compliance	CSO + security buyers	Security + SASE
Retail	Creating an Omnichannel Strategy (Uniting physical and digital retail experiences)	CTO + DX + CX + IT + Store Managers	Networking
	Optimizing value from technology investments	CIO + CTO + IT	Networking
	Adopting sustainability practices	CEO + COO + IT + Supply chain + procurement	Networking
	Physical footprint (theft / shrinkage)	COO/CSO + IT + Security buyers + Store Managers	Security + End point
Tech Adoption	DX transformation	CTO + DX + IT + LOB Managers	UCC + Security + Networking
	Application modernization roll out	CTO + IT and Platform leads + Dev	Networking
	End point management roll out	Security + IT	Security
	Supply chain management evolution	COO + IT + Supply chain + procurement	Networking + Security

Account Insights

New buyer groups

Solution sell realignment

# CLUSTER PROGRAM OVERVIEW



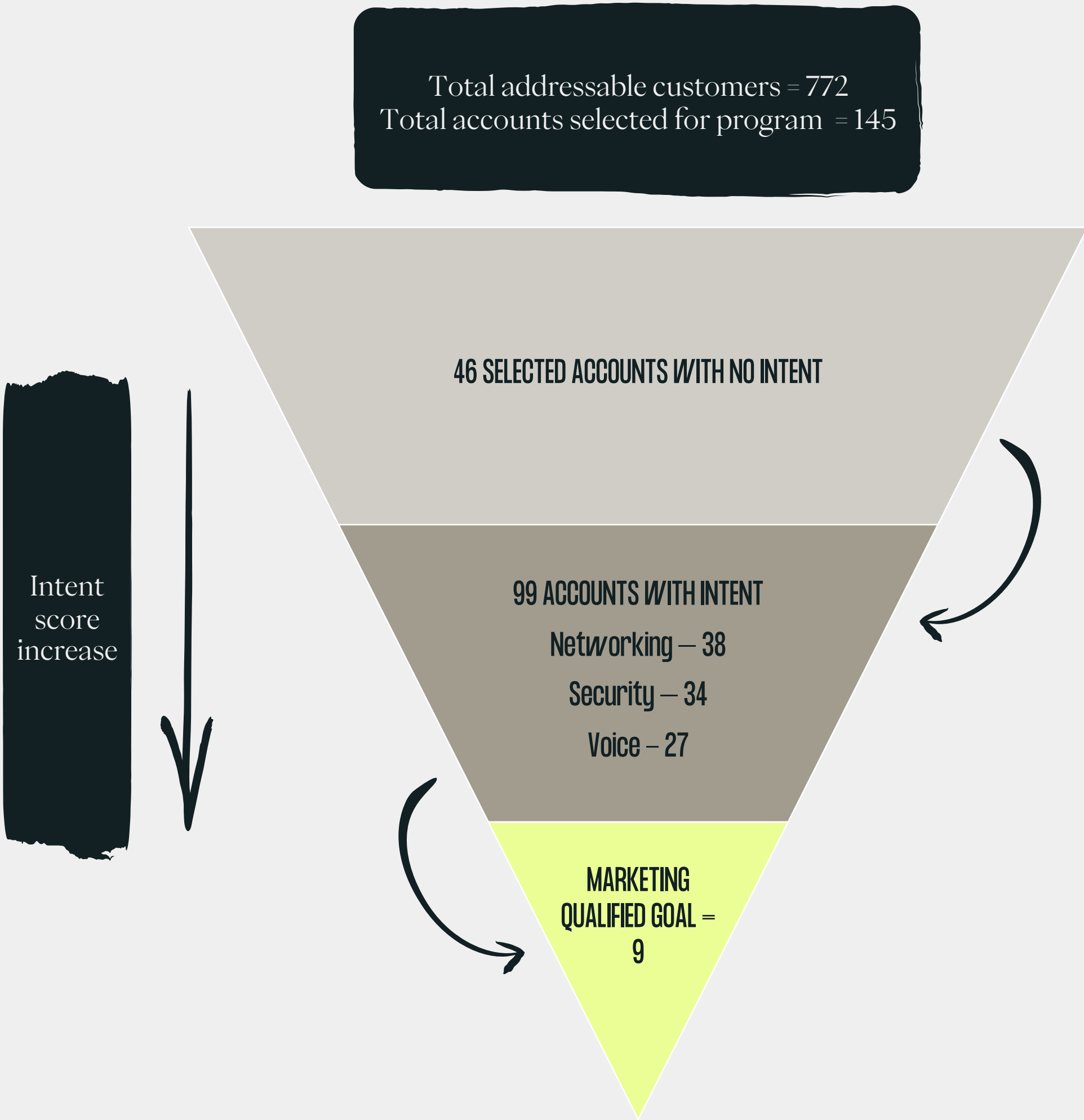
# FINANCE ACCOUNT SNAPSHOT + OBJECTIVES

Total Accounts: 722

Total High or Very High Growth Accounts: 292

Growth Propensity Percentage: 40.44%

30% dim/dark  
70% upsell/cross sell



## OBJECTIVE ALIGNMENT

**Reach spend:**  
For accounts with no intent, our objective is to trigger more active interest in business challenges that can lead to our solution conversations. We will do this through account targeted ads (some spill over thought leadership).

**Activate:**  
For accounts exhibiting signs of active intent, our objective is to provide air cover for marketing and sales tactics, convert 3<sup>rd</sup> party intent signals into 2<sup>nd</sup> and 1<sup>st</sup> party actions (i.e. ad views/clicks and web views). We will do this through account targeted ads, LinkedIn retargeting, and publisher co-brand initiatives.

**Convert:**  
Prepping for sales outreach and conversion conversations, our objective is to fill in marketable leads for extended buyer groups. We will do this via content syndication with BANT qualification and proactive sales outreach.

# MEDIA MIX MODELING

## TACTIC MIX

Reach spend: Demandbase only

Activate: Demandbase + Paid Social + Publisher

Convert: Content Syndication

## FORMULAS + ASSUMPTIONS:

Demandbase = # TAL Domains \* \$300 per month \* media flight

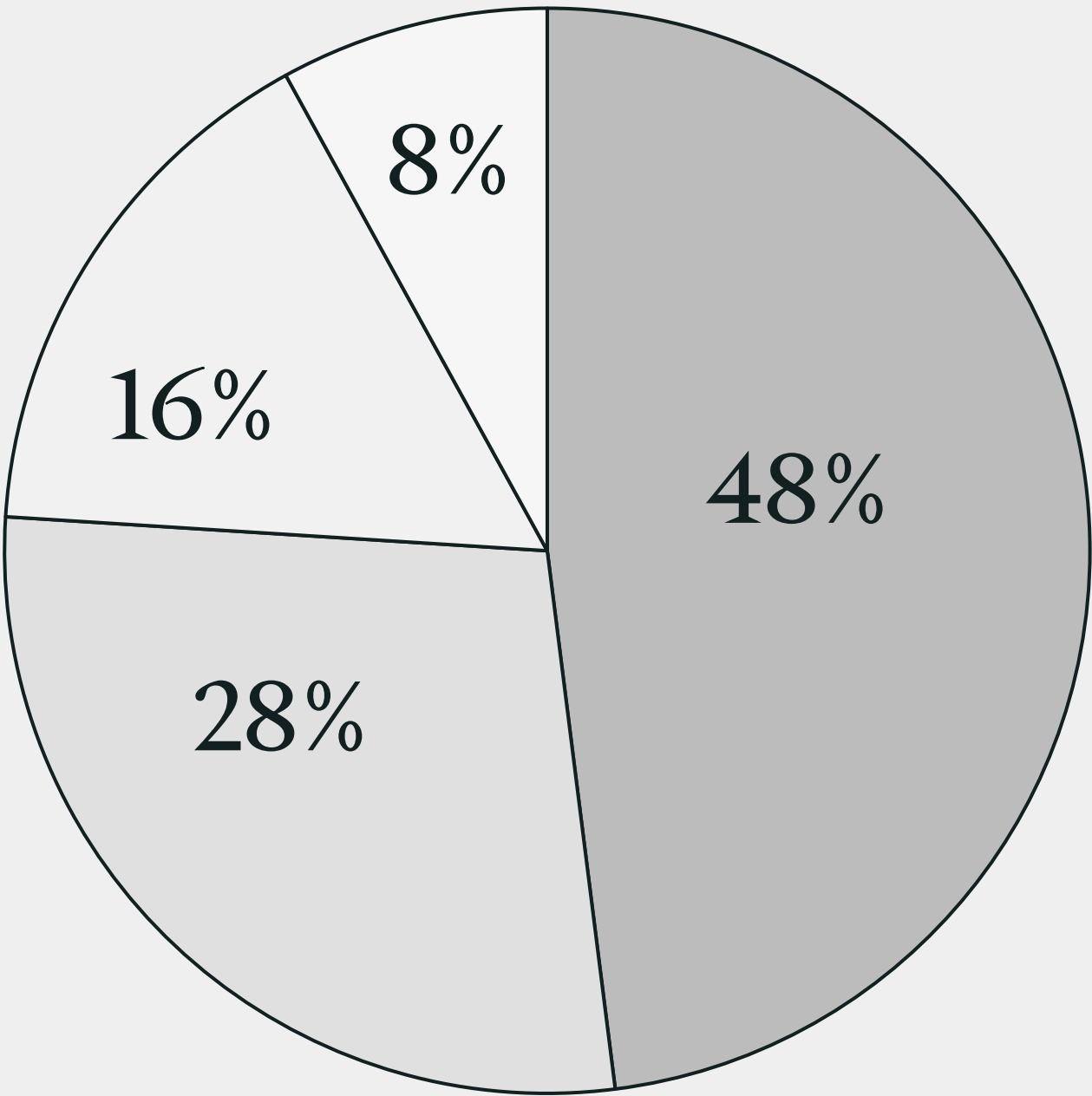
Publisher program = Typical cost - \$50-\$100k

Content syndication = # High Intent Accounts \* DM per account \* \$250 (average BANT quality lead)

Paid Social = Remaining budget allocated for retargeting

## BUDGET BREAKDOWN @ \$250k = ~150 ACCOUNTS

- Demandbase
- Publisher (thought leadership or small event)
- Content Syndication
- Paid social (LN + Meta)





# PLAY DEPLOYMENT



LUMEN®

The on-demand network you never need to own

Lumen IP Solutions customers report benefits equal to an average **\$1.5M annually**.<sup>1</sup> See how much your business could save.

Learn more

100% The Business Value of Lumen IP Solutions, January 2024

LUMEN®

Get up to **308% 3-year ROI** with Lumen UC&C Solutions<sup>1</sup>

Optimized UC&C for Enterprise.

Learn more

100% The Business Value of Lumen Cloud-Based UC&C and Video Solutions, March 2024

LUMEN®

Lumen IP Solutions customers saw **40% faster app performance**<sup>1</sup>

Fast, reliable networking for retail.

Learn more

100% The Business Value of Lumen IP Solutions, January 2024

LUMEN®

Lumen DDoS Mitigation customers report increased net operating profit valued at **\$3.4M** over three years<sup>1</sup>

Protect and secure your finance data.

Learn more

100% The Business Value of Lumen DDoS Mitigation Solutions, April 2023

LUMEN®

5 keys to a connected future

Combining physical, digital and third-party services into a unified, frictionless ecosystem.

Learn more

Finance Proactive Proposal

Retail Proactive Proposal

LUMEN

The essential guide to building the store of the future

The store of the future's most important ingredient: People

Contents

- Introduction
- Chapter 1: The store of the future
- Chapter 2: The store of the future's most important ingredient: People
- Chapter 3: The store of the future's most important ingredient: People
- Chapter 4: The store of the future's most important ingredient: People
- Chapter 5: The store of the future's most important ingredient: People
- Chapter 6: The store of the future's most important ingredient: People
- Chapter 7: The store of the future's most important ingredient: People
- Chapter 8: The store of the future's most important ingredient: People
- Chapter 9: The store of the future's most important ingredient: People
- Chapter 10: The store of the future's most important ingredient: People

Strong brand resilience in retail

Build the right foundation

Integrate to a comparable IT landscape

Find out where Lumen can help

Examine readiness

Start now

Next steps

LUMEN

Upgrade your digital transformation strategy

Contents

- Introduction
- Chapter 1: Upgrade your digital transformation strategy
- Chapter 2: Upgrade your digital transformation strategy
- Chapter 3: Upgrade your digital transformation strategy
- Chapter 4: Upgrade your digital transformation strategy
- Chapter 5: Upgrade your digital transformation strategy
- Chapter 6: Upgrade your digital transformation strategy
- Chapter 7: Upgrade your digital transformation strategy
- Chapter 8: Upgrade your digital transformation strategy
- Chapter 9: Upgrade your digital transformation strategy
- Chapter 10: Upgrade your digital transformation strategy

The secret to digital transformation is people

7 answers to help you embrace digital transformation

#1 Why do we need to embrace digital transformation efforts now?

#2 How do we get digital transformation on track?

#3 Why do we need to embrace digital transformation efforts now?

#4 How do we know if we're ready?

#5 Why should we choose Lumen as our strategic partner?

#7 Why do we need to start now?

Next steps

LUMEN

5 keys to a hyperconnected future

The hyperconnected bank's most important ingredient: People

Contents

- Introduction
- Chapter 1: The hyperconnected bank
- Chapter 2: The hyperconnected bank's most important ingredient: People
- Chapter 3: The hyperconnected bank's most important ingredient: People
- Chapter 4: The hyperconnected bank's most important ingredient: People
- Chapter 5: The hyperconnected bank's most important ingredient: People
- Chapter 6: The hyperconnected bank's most important ingredient: People
- Chapter 7: The hyperconnected bank's most important ingredient: People
- Chapter 8: The hyperconnected bank's most important ingredient: People
- Chapter 9: The hyperconnected bank's most important ingredient: People
- Chapter 10: The hyperconnected bank's most important ingredient: People

Examine the current banking landscape

Design your hyperconnected blueprint

Adapt new technologies

Transition legacy systems into a cloud IT landscape

Find out where Lumen can help

Start now

Next steps

# THE SOLUTION

To increase engagement within target industries, we developed a suite of **new content**, including eBooks tailored to the specific challenges of the retail and finance clusters. These materials were supported by personalized proposals and a mix of print and digital follow-ups. We also collaborated with **thought leaders and publishers** like HBR, MIT, and Foundry to create high-value content pieces that positioned Lumen as an authority in key sectors. These efforts were amplified through **paid media campaigns** on platforms like Demandbase and LinkedIn, ensuring precise targeting based on account intent signals.



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## PHASE 1

Challenge Awareness (Intent building)  
Content Syndication (contact expansion)  
Marketing Nurture (post-action qualification)  
Sales enablement (Hand-off alignment)  
Sales presentation (Solution-level)

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## PHASE 2

Thought leadership hybrid program  
Industry event surround  
Proactive proposals  
Executive outreach  
Sales profile builder

# PLAY TYPE 1 — CHALLENGE AWARENESS

## What it is:

This is a high funnel, Reach level play designed to showcase the variety of solutions Lumen offers

## Who it is for:

This play is specifically targeting account level contacts who have shown **low** intent scores based on 1<sup>st</sup> and 3<sup>rd</sup> party data

## Why it will work:

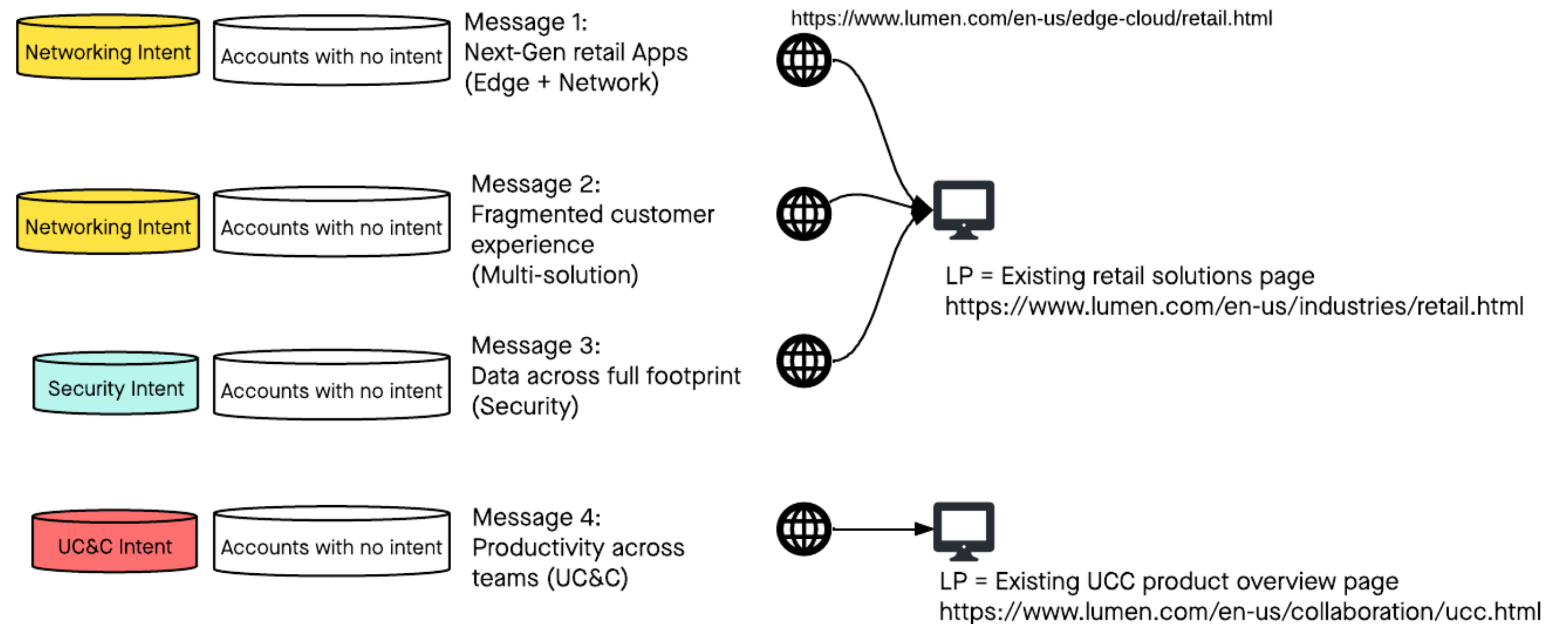
This portfolio showcase will open the aperture of customers in the services, capabilities, and solutions Lumen offers and is designed to go "beyond TelCo"

## What will be created:

- Marketo landing pages
- Display ad units (demand and retargeting)
- Refreshed existing content
- Chat bot scripts

## Where it will drive:

These journeys will drive account level contacts to either set a meeting (triggering a sales enablement motion), or to an **Attract** level play





# PLAY TYPE 2— CONTENT SYNDICATION

**What is it:** Dedicated media activity deployed across content syndication partners. We will take the best content for selected accounts, pass to providers, and pay for MALs on a cost-per-lead basis.

**Who it is for:** Accounts with limited contactability within existing marketing motions. We will define this list based on comparing Zoominfo vs. SFDC/marketo contacts for each of the selected accounts.

**Why it will work:** Content syndication is a best practice channel for capturing marketing contacts. We will maintain the account target list and ensure content is best suited to capture missing contacts

**What will be created:**

- Marketo form pages
- Content + abstracts
- Social drivers (if necessary)

**Where it will drive:**

Captured leads will be passed from partners into email nurture activity

## Best of existing assets



Security content 1:

1/ How Next-Generation Technologies Are Powering Digital Transformation

2/ SASE: A Journey Toward Network Security



UC&C content 1:

A journey to agile, flexible, global collaboration brochure  
ice and UC&C solutions



Networking content 1:

1/ Unlock the Full Potential of Network, Data and Applications: How Top Industry Performers Lead the Way

2/ How Next-Generation Technologies Are Powering Digital Transformation

# PLAY TYPE 4 — MARKETING NURTURE + RETARGETING

## What it is:

This play is an ROI Calculator that is designed to show bottom line, revenue-based outcomes. It also operates as **our initial play to market** allowing customers to self select into intent pools

## Who it is for:

Convert account level prospects who have **any** intent scores across 1<sup>st</sup> and 3<sup>rd</sup> party data

## Why it will work:

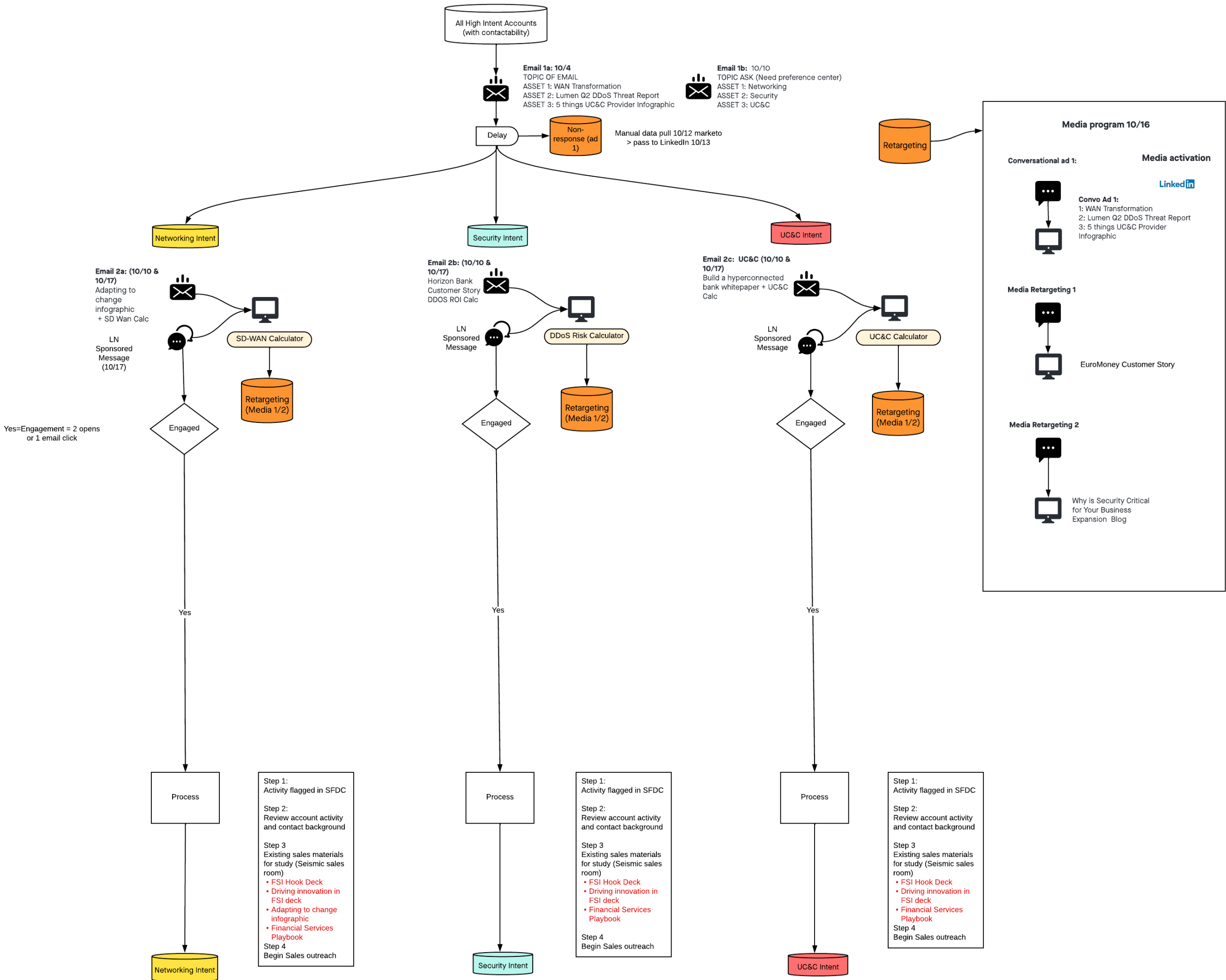
ROI Calculators are a powerful tool to show customers targeted, tactical outcomes of implementation of Lumen solutions.

## What will be created:

- LinkedIn Conversational advertisements
- Email content
- Updated assets for email drivers
- Retargeting assets

## Where it will drive:

This play should drive to either an SDR or sales follow up, or a general retargeting pool. It also acts as an intent tool to move account level prospects into the proper user journey





PLAY TYPE 5— SALES ENABLEMENT

april6

What is it:

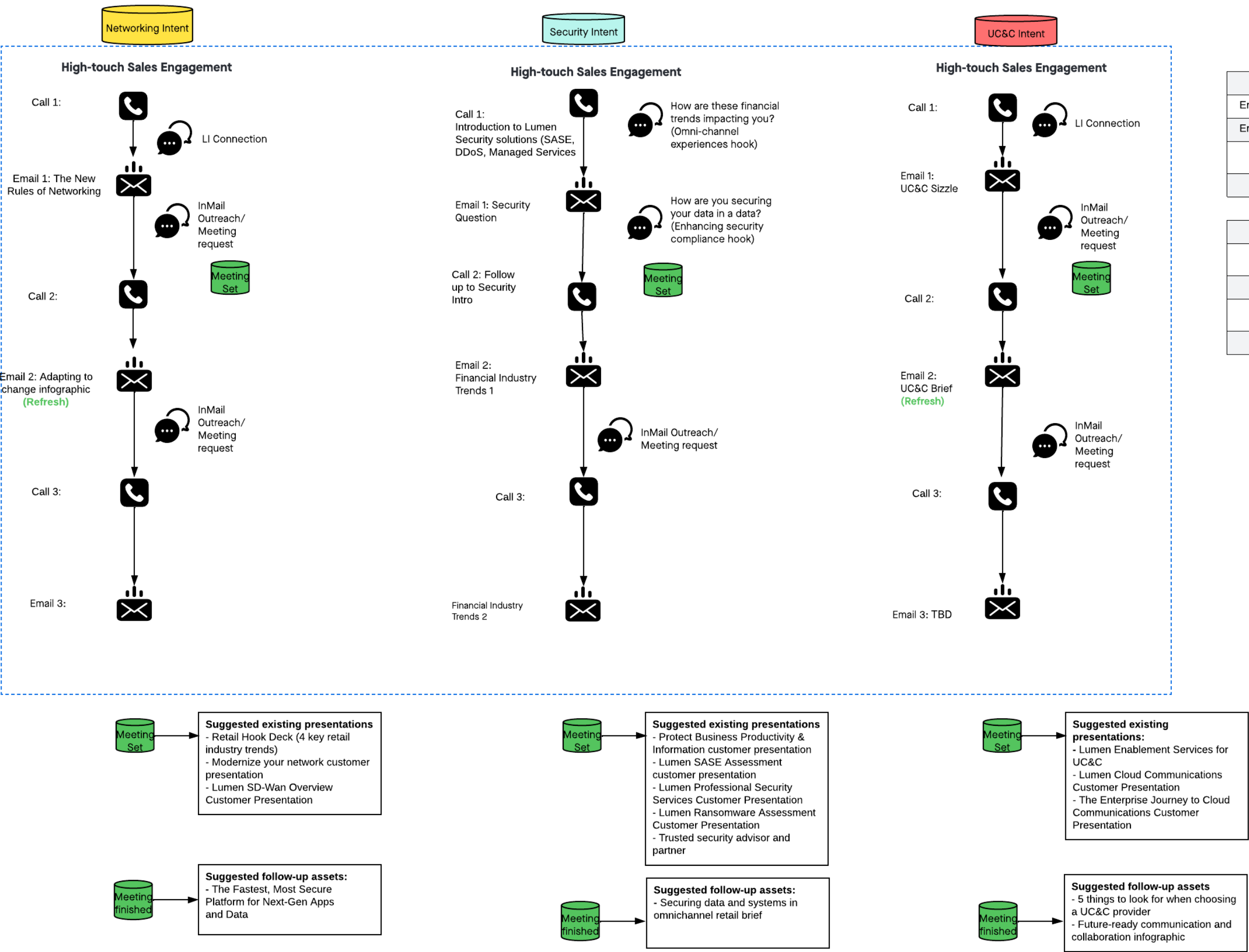
This is a series of sales enablement materials which will be delivered via Seismic. The materials are specifically designed to help with direct sales outreach to accounts in our three intent groupings, networking, security, and voice/UCC.

What will be created:

- 9-touch outreach sequence
- Direct Sales emails
- Direct LinkedIn Connect and InMail outreach
- Call Scripts
- Conversation Guide

What is your role:

Day 1, we are asking teams to review materials and prepare. As assigned accounts show action (i.e., intent movements across the account, new contacts from content programs, activity across Lumen domains or actions in marketing materials) we will alert reps through weekly automated emails. Arming yourself with the context of those movements in SFDC/ Demandbase, outreach sequences can be deployed by sales teams.



	Challenge	CTA
Email 1 + InMail 1	Retail trends a	
Email 2 + InMail 2	Retail trends B	
Email 3	Variable	

	Challenge	CTA
Email 3a	TBD	
Email 3b	vSOC question	
Email 3c	UC&C call volume stat	

# CONVERSATION GUIDE + SALES EMAIL EXAMPLES

Where they will drive:

These materials are designed to help with pre-briefing, written outreach (email and LN), and prospecting calls that ultimately result in setting meetings.

## CALL SCRIPT (Networking)

**Body Copy**  
*Recommendation: 1 paragraph. Required: 5 sentences Max*  
Hi, [PROSPECT NAME], my name is [SELLER NAME] and I'm calling to discuss how a flexible, smart network can help [PROSPECT ORGANIZATION] excel in the competitive world of banking and finance.

Lumen Networking Solutions deliver a secure, fully managed and highly resilient network designed specifically for the demanding needs of financial institutions. Keep your network seamlessly connected to your applications, devices, cloud and on-premises data storage. Then use that connectivity to provide stronger, more reliable and more personalized customer experiences across all banking platforms, including branch locations, online, call centers and ATM networks.

## CALL SCRIPT (Security)

**Body Copy**  
*Recommendation: 1 paragraph. Required: 5 sentences Max*

Hi, [PROSPECT NAME], my name is [SELLER NAME] and I'm calling to discuss how you can protect [INSERT ORGANIZATION NAME HERE], your customer's data and your brand reputation from escalating cyberthreats in the financial industry.

Financial institutions like yours store and transfer large volumes of money, making them more vulnerable to cyberattacks than other businesses. For cybercriminals, attacking financial institutions offers multiple avenues for profit through extortion, theft and fraud. From financial losses to reputational damage, to penalties, to insurability issues, to legal liabilities and beyond, the risks are many.

With Lumen, you can protect customer data, secure devices and minimize attack risks across your organization. When you have time for a longer chat, I can take you through Lumen's advanced threat protection and intelligent detection so you can mitigate the effects of cyberattacks.

### EMAIL 1A

**Subject line – Live Type**  
*Recommendation: 45 characters or less. Will truncate ~40-60 characters based on device, app, etc.*  
*Requirement: Sentence case. No ending punctuation.*  
Transform your business with smart networking

**Preview line – Live Type**  
*Recommendation: 45 characters max. Mention key words early, could truncate anywhere.*  
*Requirement: Sentence case. No ending punctuation.*  
Smart networking for financial institutions

**Body – Live Type**  
*Recommendation: 350-1000 characters approx. May include bullets.*  
*Requirement: Sentence case. Standard punctuation.*  
Hi {{contact\_firstName}},

As a [TITLE] at Lumen, I work with businesses in the banking and finance industry on enhancing their networking solutions. Research from Deloitte reveals that a staggering 57% of businesses face agility issues with their legacy systems.<sup>1</sup> Are the networking tools you're currently using at [COMPANY NAME] standing in the way of your progress?

If so, we should talk. If you have 30 minutes to spare I'd welcome the opportunity to discuss how scalable and flexible smart networks can seamlessly connect your applications, devices, cloud and on-premises data storage. Let me know what works for you and I'll set something up.

Thanks,

[NAME]  
[TITLE]

## SELLER'S GUIDE

**Context setting / Purpose**  
This seller's guide is designed to prepare you for your follow-up conversation with business and technical decision makers in banking and finance organizations who responded to one of your seller outreach emails or LinkedIn messages. It provides relevant information across the categories of Networking, Security, and UC&C to help you structure your first discovery conversations with an account after a formal call has been scheduled in your initial outreach.

**Getting started questions:** List of questions to help start the conversation and connect to email outreach.

Depending on what emails have already been sent there are a host of different call script modifiers that can be used to ensure your calls are contextually relevant to what the account has already seen. Here are some modifiers that can be added to the call script provided to make it contextually relevant.

### Networking

**Outreach Modifier A:** (If Networking sales email 1/LinkedIn InMail 1 has been sent with no response): I know reliably connecting to and collecting data from different sources like applications and on-premises and cloud data storage locations can be difficult. How are you currently managing that data, and do you feel that data is being fully accessed and utilized?

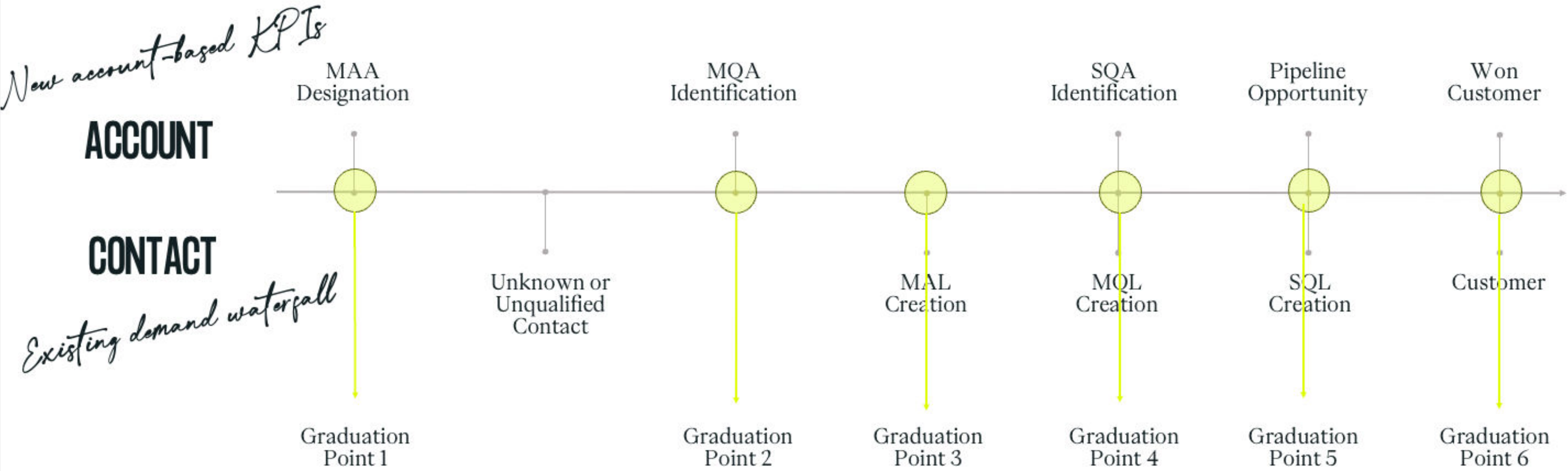


# ENABLEMENT

# HOW TO COMBINE ACCOUNT & CONTACT MILESTONES

When we dug into enterprise selling motions with an ABM lens, we had to consider both contact level actions and account-level activity (intent signals). We don't need to throw out old processes, but we do need to layer on new measures and define the rules for how our marketing changes based on key identifiable moments in the buyer journey.

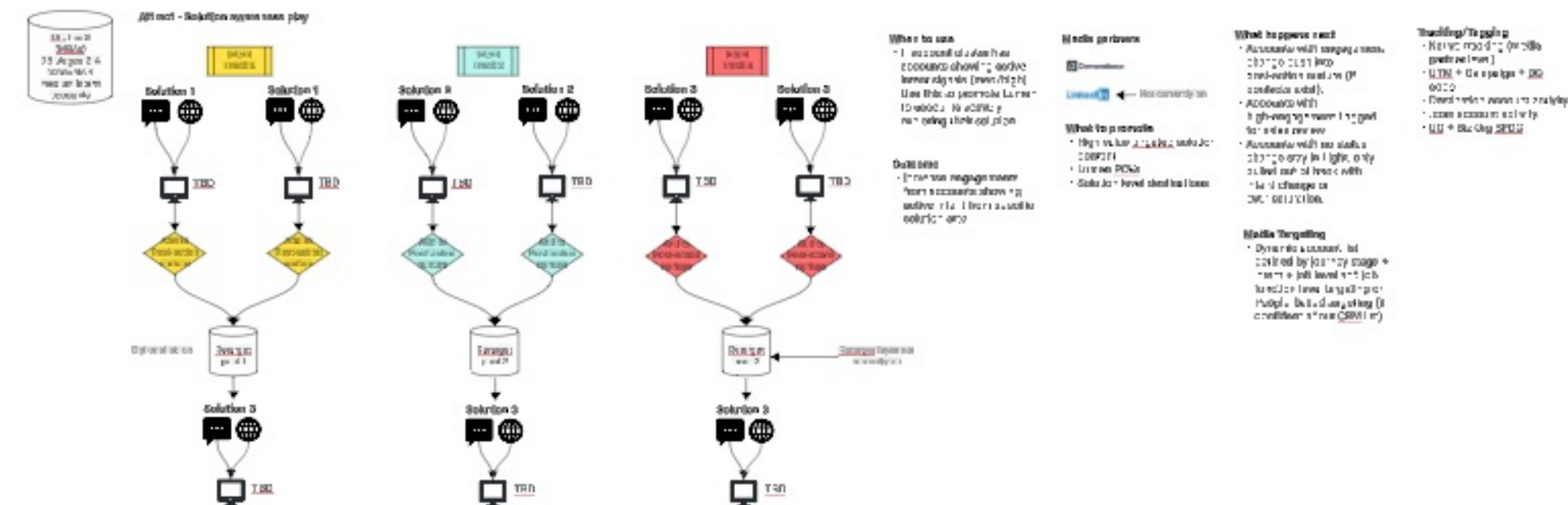
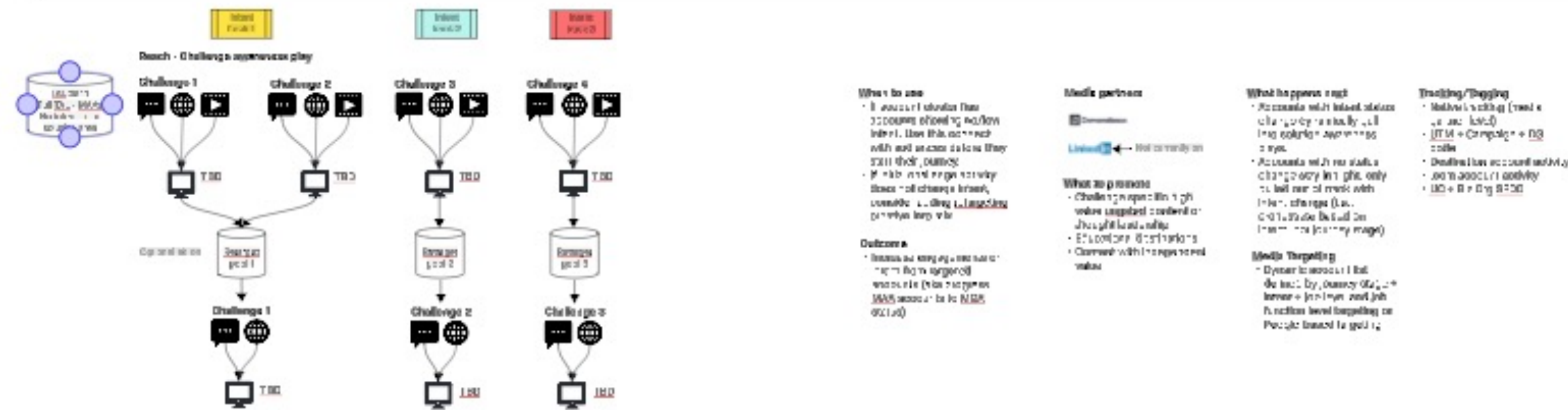
What that looked like for Lumen, was the introduction of three new measures (MAA, MQA, SQA) and six key moments that we called "graduation points" where we changed/pivoted their marketing tactics to more effectively allocate marketing budget and resources based on performance.



# THE SOLUTION

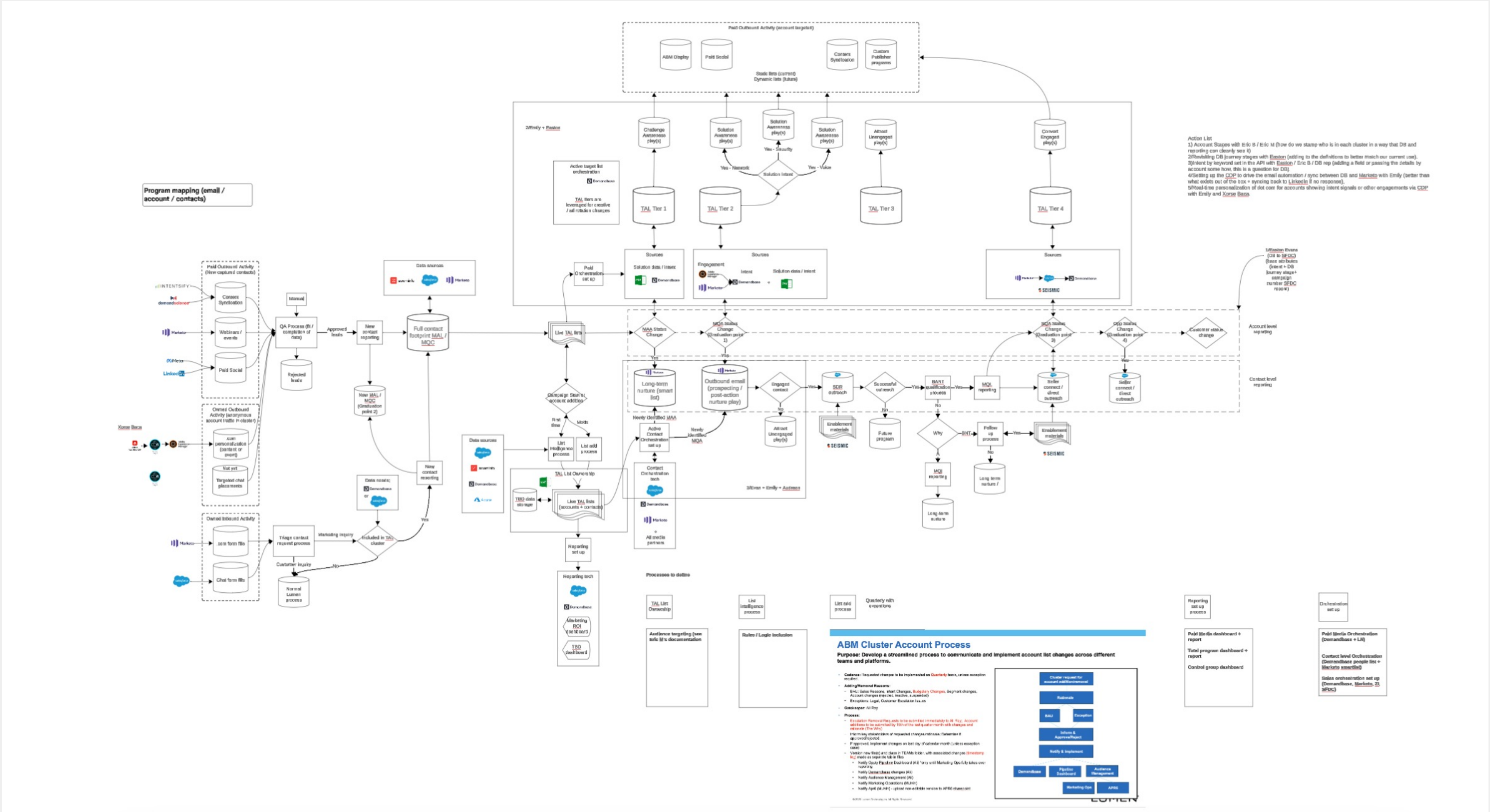
Finally, we enhanced Lumen's internal capabilities with new KPIs to track account progression and a comprehensive ABM training program delivered through ABM bootcamp sessions. This training equipped Lumen's teams with foundational knowledge and advanced best practices for implementing ABM strategies.





A robust ABM framework that combined strategy, tools, and training to address Lumen’s unique marketing challenges. At the heart of this effort was the creation of an **ABM playbook**—a dynamic library of pre-configured, agnostic plays designed to guide Lumen's marketing team. Each play came with detailed notes on use cases, expected outcomes, and content recommendations, ensuring flexibility and scalability for future campaigns. We complemented this with a **tech stack orchestration** flow diagram, outlining the processes and tools required to execute 1:few or 1:many campaigns seamlessly.

ABM ENGINE TECHNOLOGY STRUCTURE AND FLOW



THE SOLUTION

To enable Lumen’s the scaled ABM launch, we audited, mapped, and identified gaps throughout the technology, people, and process. We knew the initial go-to-market needed to leverage existing data sources, while also adding an operationalized intent layer. This would allow us to slowly introduce new account-based tactics and metrics, while still maintaining and reporting on Lumen’s existing demand generation KPIs. In parallel, the model we built would need to be accompanied by a training program to ensure Lumen could eventually own and run it themselves.



ABM 201

### Agenda

Full funnel marketing

Process overview / reminders

Graduation points and definitions

Creating and aligning clusters


Projections, budgeting, and scenario planning

KPI development

Demandbase deep dive

Helpful best practices

Play selection, sizing, and library deep dive (Lucid)



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### Process Overview

Foundation

**Program pre-work to identify**

- Cluster opportunity
- ICP development
- Investment Planning
- Cluster marketing and sales kickoff

Build It

**Program Insights**

- Imperatives + sales workshops

**Program Design**

- TAL creation
- Program strategy development + play identification
- Content audit & BoM creation
- Play development & execution
- Systems set-up & orchestration

Run It

- Marketing + sales bi-weekly syncs
- Monitor account activity
- Program reporting

Optimize

- Monthly cluster strategy & play optimization sessions
- Quarterly planning + Ad hoc play creation

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# THE SOLUTION

Finally, we enhanced Lumen’s internal capabilities with new KPIs to track account progression and a comprehensive **ABM training program** delivered through ABM bootcamp sessions. This training equipped Lumen's teams with foundational knowledge and advanced best practices for implementing ABM strategies.

### Investment Planning

Part of the planning process is working through budgets based on existing benchmarks (average opportunity value, pipeline conversion numbers, etc.). By starting with a revenue goal and working backwards we can ensure we right size spend and account list quantity. Through the process, we can answer key questions.

1. Do we have a viable ICP / Cluster based on customer value?

2. How many clusters / accounts should we target at once?

3. How much should we plan to spend per account?

4. How do we divvy up our budget between different phases of the buying journey?

5. What is the projected ROI of the effort?

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### ABM Maturity Model

Maturity

Strategy and approach	<b>Exploring</b> Planning your ABM Strategy	<b>Experimenting</b> Piloting, measuring, refining your approach	<b>Expanding</b> Increasing account coverage	<b>Embedded</b> Driving strategic growth
Sales and marketing alignment	<b>Philosophical Alignment</b> <ul style="list-style-type: none"><li>Shared belief in an account-based approach</li><li>Commitment to collaboration</li></ul>	<b>Operational Alignment</b> <ul style="list-style-type: none"><li>Target account selection</li><li>Planning and execution cadence</li></ul>	<b>Executional Alignment</b> <ul style="list-style-type: none"><li>Team reviews of account activity and follow-through</li><li>Mutual respect of contributions</li></ul>	<b>Metrics and Goals Alignment</b> <ul style="list-style-type: none"><li>Shared across teams</li><li>Connected to business impact</li></ul>
Cluster approach	<b>Top Targets</b> -1:1 - Top 10-20 revenue generating accounts	<b>Company Size or Industry Targeting</b> <ul style="list-style-type: none"><li>Mid market vs enterprise</li><li>FSI vs manufacturing vs healthcare</li></ul>	<b>Sales Cycle Targeting</b> <ul style="list-style-type: none"><li>Prospect vs customer</li><li>Pre-sales engagement Vs. pipeline push</li></ul>	<b>Positioning/Attribute Targeting</b> <ul style="list-style-type: none"><li>Technology footprint</li><li>Competitive displacement</li><li>Regulatory issues</li></ul>
Technology alignment	<b>Bottom of the Funnel/Lead Gen</b> <ul style="list-style-type: none"><li>Account data append</li><li>MAS/CRM use</li></ul>	<b>Digital connections</b> <ul style="list-style-type: none"><li>Account-driven Ads/attraction</li><li>Account website engagement</li><li>ABM platform use</li></ul>	<b>Full Funnel Digital</b> <ul style="list-style-type: none"><li>Stage-based Account</li><li>Customized Website engagement</li><li>Display/Social, ABM, MAS, and CRM platforms connected</li></ul>	<b>Analog and Digital Full Funnel</b> <ul style="list-style-type: none"><li>All account activity tracked and operationalized. Full-funnel digital connected with physical events, field and sales activities.</li></ul>
Measurement	<b>Campaign performance</b> <ul style="list-style-type: none"><li>CTR's</li><li>Conversions</li><li>Inquiries</li><li>MQLs</li></ul>	<b>Account Performance</b> <ul style="list-style-type: none"><li>Account reach, lift</li><li>Trackable MQAs and SQAs delivery</li></ul>	<b>Revenue Performance</b> <ul style="list-style-type: none"><li>Predictable MQA, SQA delivery</li><li>Team-sourced Pipeline</li><li>Funnel velocity</li></ul>	<b>Business Outcomes</b> <ul style="list-style-type: none"><li>ACV</li><li>Close rate</li><li>Retention/upsell</li></ul>

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# THE RESULTS

Within just **six months**, Lumen successfully transitioned its field marketing teams to adopt ABM practices, positioning them for continued ownership and growth of the program.

Tactically, the campaign delivered impressive outcomes across key segments. In the large enterprise vertical, proactive proposals exceeded expectations, with the finance cluster achieving a 264% increase in funnel size and a 131% increase in open opportunities. Retail efforts saw moderate gains, including a 10.2% increase in open opportunities.

Public sector outreach was highly successful. In healthcare, Demandbase campaigns exceeded impression goals, while LinkedIn achieved a 0.84% click-through rate, surpassing benchmarks. Public administration campaigns generated over 6 million impressions on Demandbase, while email initiatives achieved a 32% open rate—significantly outperforming industry standards.

*Finance cluster*

264%

increase in  
funnel size

131%

increase in open  
opportunities

*Retail*

10.2%

increase in open  
opportunities

*One to few*

100%

Accounts reached

By driving measurable gains in funnel growth, engagement, and open opportunities, the campaign not only advanced Lumen's business objectives but also equipped their teams with the tools and training to sustain long-term success in a highly competitive market.



# DISCUSSION



**YOU**

**THANK**