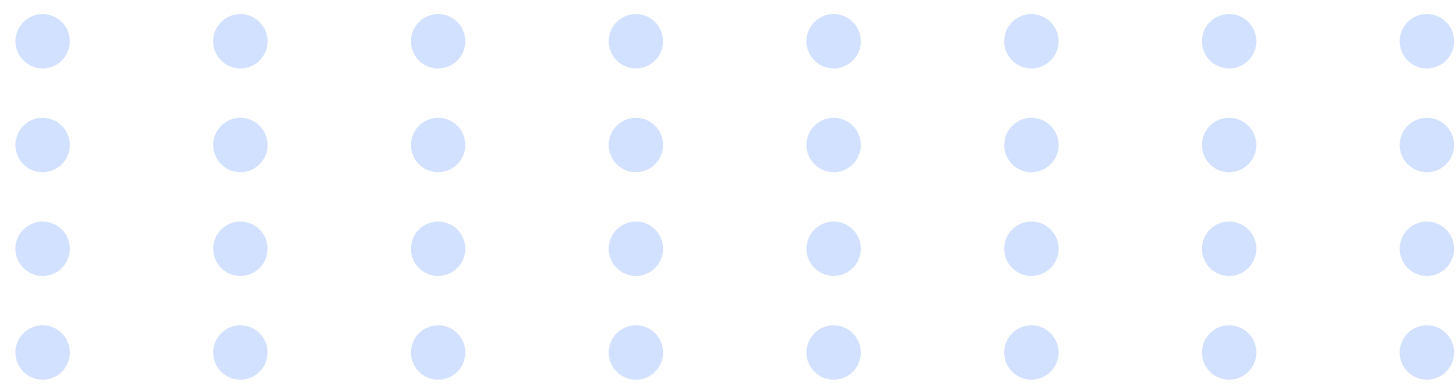


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Winning the Battle:

Leveraging ABM for a Competitive Edge



Why Competitive Displacement Is Crucial for **Winning Market Share**

Imagine your top prospect is about to switch vendors. Is your company the first they consider?

A 2022 study from [Bain & Co. and Google](#) shows that, out of 1,200 B2B tech buyers, 90% of buyers choose vendors from their Day 1 list—that important list of the companies they already have in mind before conducting any research on other potential vendors.

Of course, this conversation isn't always "one and done." If companies aren't growing, they're dying. They must constantly evaluate their tech stacks, as they may outgrow important systems or need to find new companies to hold valuable datasets. Internal stakeholders may change, bringing along new decision-makers who want to consider other vendors based on their past experiences with other tools and workflows. These internal changes, as well as external market forces, create unpredictability throughout the market—which means you need to focus on always being a contender for a spot on your target accounts' Day 1 lists.

Forrester notes that we're in the [buying_group_era](#), where more companies rely on buying committees who collectively come to a decision but largely do their own independent research. You'll need to convince a wide range of stakeholders: those using the product, those signing off on the budget, and those who could tangentially benefit from your product.

As the buying process is largely digital, there's plenty of opportunities to reach these buyers. And an account-based approach is the most effective route to take with competitive displacement.

Your competitive displacement strategy sounds simple: Aim at taking customers away from your competitors to increase your company's revenue and market share. There's less focus on educating the buyer on the importance of having a solution in the first place. Instead, you need to drum up motivation to switch to your solution by telling buyers *why* they need to make the switch.

But to make a successful competitive displacement campaign requires a deep understanding of the current competitive landscape and your level of brand awareness. Accounts considering a vendor switch may or may not have heard of your brand. They also may have heard of your brand but not associate your brand with their specific pain point. You may need to invest in this area to strengthen your awareness if you fall

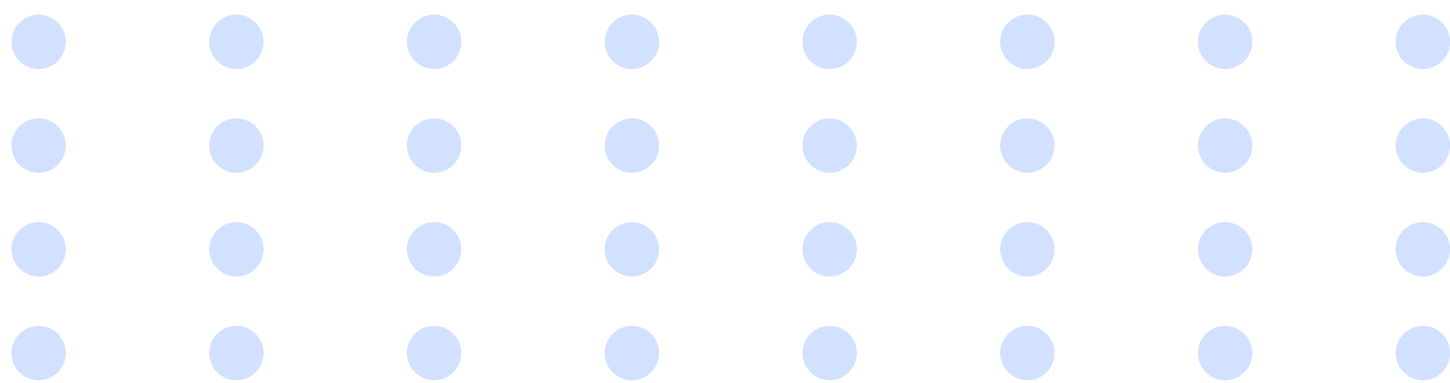
behind the competition. And that investment includes taking a deep look at your content, messaging, and ads to ensure they align with pain points against known deficiencies of the competitor or differentiated value of the company and motivates buyers to choose you.

Marketers should supplement most of this work with intent data and use it to create relevant audiences and messaging based on internal first-party data, buyer research signals, or technographic data. And while having access to intent data is important, decision-makers can change, and company priorities can shift quickly.

A strong go-to-market plan, backed by data, maximizes your competitor displacement campaigns' effectiveness of going after the right accounts and segmenting based on where they are in the buying process. These four steps build your competitive displacement strategy with an account-based marketing (ABM) approach so that you can quickly foster trust with buyers, raise your brand equity across the marketplace, and impact your marketing and revenue metrics so you can focus on providing premium customer service.

The Strategy

- ➔ **Segment Your Target Accounts Based on Buyer Readiness**
- ➔ **Personalize Outbound Media Campaigns**
- ➔ **Nurture with Compelling Content**
- ➔ **Track the Key Metrics to Accelerate Conversion**



Step One: Segment Your Target Accounts Based on Buyer Readiness

While you want to convert all your competitors' customers to your solution, you need to be tactical about your approach. You need to segment your target accounts based on their buyer readiness, which you can determine by analyzing your intent and engagement data to figure out who is actively looking for a new solution versus who isn't ready to make the switch.

Analyze your intent and engagement data by segmenting it into three categories—high intent, moderate intent, and low intent—which helps you determine where accounts are within the buyer's journey. Use the following three key categories to further segment your audience:

- **Technology installs** identify the accounts using a competitive solution
- **Trending topics** uncover the accounts researching a specific pain point
- **Brands** pull out the accounts specifically engaging with one or more brands

By layering these intent data sources, you're honing in on the accounts that truly fit the profile of a competitive takeout initiative. You can then refine your segments based on their funnel stages, which gives you the ability to build hyper-personalized experiences and drive higher engagement from your plan.

Identify Your Three Target Segments

Organizing your target audience into the three categories listed above is one thing—but to truly get to the level of personalization and engagement you desire, you need to dig deeper into your intent, engagement, and technographic data. Technographic data is especially important, as you can determine what software your buyers already use and how you can serve them better than your competitors, whether it's with better integrations with other software or speaking directly to your competitors' weaknesses.

Here are three key target segments, organized by intent level, that you can dig deeper into from your datasets:

Segment 1, Low Intent: Accounts Using a Competing Solution, but Not Currently Looking to Switch to Another Vendor

These accounts may or may not be in-market, and may or may not have heard of your brand. Building your brand awareness and expertise is key for this segment so that when they do move in market, they are already familiar with your brand.

Intent data to pull:

- Accounts matching your ideal customer profiles (ICPs)
- Tech installs

This is the largest target account list where you target the accounts who fit your ICP and use a competing product or software.

Segment 2, Moderate Intent: Accounts in the Early Stages of Switching to Another Vendor

These accounts may or may not be familiar with your brand; however, they are showing signs of interest within their researched topics. These accounts will need some encouragement on why they should make a change. Make your brand visible in front of these accounts and educate them on how your product can address specific pain points and provide greater value than their supplier. You'll also want to identify where competitors' sore spots are, and layer them on top of your install base insights. From there, you can dig deeper into your target account list and segment by pain point if it's common among multiple competitors.

Intent data to pull:

- Accounts matching ICP
- Tech installs
- Trending on topics related to your solution

This target account list shows signs of moving in-market as they start researching topics that are relevant to your solution but, at the same time, are already using a competing product.

Segment 3, High Intent: Accounts About to Make a Decision to Switch Vendors and Are Considering Multiple Brands (Including Yours)

This segment is actively researching and showing signs that they're going to switch vendors. Because of their high intent signals, you need to focus your efforts on these accounts. Maximize your visibility to increase engagement with your brand, and show your differentiated value and why you should be picked over your competitors.

Intent data to pull:

- Accounts matching ICP
- Tech installs
- Trending on your own brand or competitor brands

This will most likely be your smallest target account list, yet it'll also most likely be the most active and market ready.

Bonus Target Segments

Use these bonus target segments to dig deeper into your segmentation and discover more opportunities for deeper market penetration and personalization.

- **Co-Selling or Install Dependency:** This segment includes accounts using two products versus a solution that has both functions. In this scenario, the messaging heavily focuses on displacing the two competitive products since the account will have to replace both products.
- **Accounts Who Could Use Your Solution Despite Having a Competitor:** In this scenario, draw attention to how you can complement the competing solution. You'll rely on technographic data to see how you can drive specific examples of a complementary product that also works with your solution, and how combining these solutions delivers better results than choosing a single vendor.
- **Winbacks:** Includes prior customers who are using a competitive solution or inactive customers who may or may not be using a competitive solution. This audience segment requires a more tailored approach, as your nurture plan needs to address why they left. You also need to identify if the stakeholders on the account are the same or if there are any changes in decision-makers on the account so you can appropriately target them and address their concerns.

Implement First-Party Engagement Data to Reduce Friction in Audience Segmentation

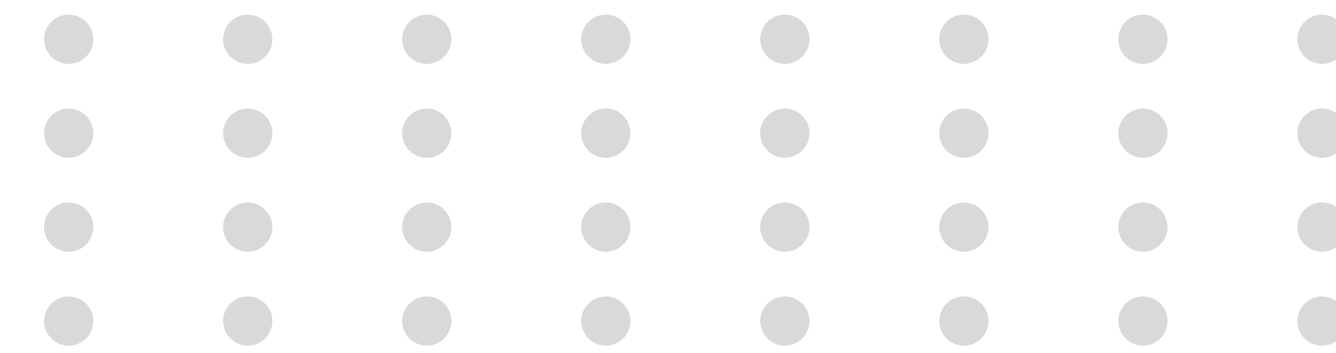
You may or may not have engagement data in your customer relationship management (CRM) or marketing automation platform (MAP) systems for some of your target accounts. If you have engagement data, you can layer it in with your targeting to reduce friction in how to engage your target audience. This will either:

- help you refine your segments so that your resources are focused on the accounts that have a higher potential to convert as they are actively engaging with your brand, or
- create sub-segments of accounts that could be served middle funnel, product-focused content as they are already familiar with your brand.

This chart outlines our three segments and how you can approach combining your segmentation with your competitive displacement goals and layering of engagement data. This example considers a company who could displace a video service like Zoom and a chat service like Slack.

Targeting	Segment 1, Low Intent	Segment 2, Moderate Intent	Segment 3, High Intent
Intent	Accounts matching ICP + Tech installs	Accounts matching ICP + Tech installs + Trending on solution topics	Accounts matching ICP + Tech installs + Trending on your brand/competitors
Strategy	Ideal for long-term brand awareness building	Early signs of being in-market	Actively researching a solution
Optimal CRM*/ MAP Data	Accounts visited your website or read any of your resources	Accounts visiting product pages on your website, reading your resources or engaging with emails (open/click)	Accounts converting on your demo/ free trial pages, attending webinars, engaging with emails (open/click)
Example	Small or medium-sized business (SMBs) using Zoom	SMBs using Zoom and researching collaboration and productivity topics	SMBs using Zoom and researching Slack

**For winbacks, you will reference CRM data*



Identify Buyer Personas Within Accounts

Once you have your smaller, deeper target segments, you need to investigate the individual accounts to determine who is on the buying committee and what their concerns and needs are. Demographic data, such as company role, will help you determine the type of content you will share with these committee members to motivate them to move through the sales funnel, from considering your brand to deciding that you are their vendor of choice.

Prioritize the following personas:

- Internal users involved in researching vendors or validating the performance impact of the solution internally, particularly any that have been flagged as unhappy with the existing provider. This group is also considered the end users, or the people who have the product license (such as a seat or login).
- Heads of departments and decision-makers that would have a role as a key technical or economic member of the buying committee. You can consider these people as the group who manages the product license.
- Additional personas from other departments who have an interest in the solution (such as a finance leader wanting to bring down spend, or the CEO who wants to see how the product impacts the company's bottom line). Consider this group as those who bought the product license, but will not be using the product directly.

Key Takeaways

- Segment your audience by low, moderate, and high levels of intent. Label these segments as accounts who use a competitor but aren't looking to switch, accounts in the early stages of making a switch, and accounts that are actively looking to make a switch from their current vendor.
- Enrich your intent data and segments with engagement and technographic data to determine what accounts are engaging with which brands and what topics they're interested in.
- Focus on the personas that have different influences on decision-making: the people who use the product directly, the people who manage the product license, and the people who would have monetary influence on product decisions.

Step Two: Personalize Outbound Media Campaigns

McKinsey research reveals that 71% of consumers expect brands to deliver personalized interactions, and 76% get frustrated when it doesn't happen. With more personalized content and messaging, you establish a deeper connection to build brand awareness and trust, which helps buyers see your company as a partner who truly understands their pain points.

Use a Variety of Channels to Engage Key Audiences and Drive Interest and Urgency

An effective multi-channel ABM approach proactively distributes content and messaging across the four channels where buying committee members spend most of their time: connected TV (CTV), content syndication, display advertisements, and LinkedIn advertisements.



CTV drives brand awareness, keeping your brand top of mind.



Content syndication captures your buyers' awareness of their challenges and needs and indicates their sense of urgency for a new solution.



Display advertisements reinforce your content and messaging and amplify your messaging and reach.



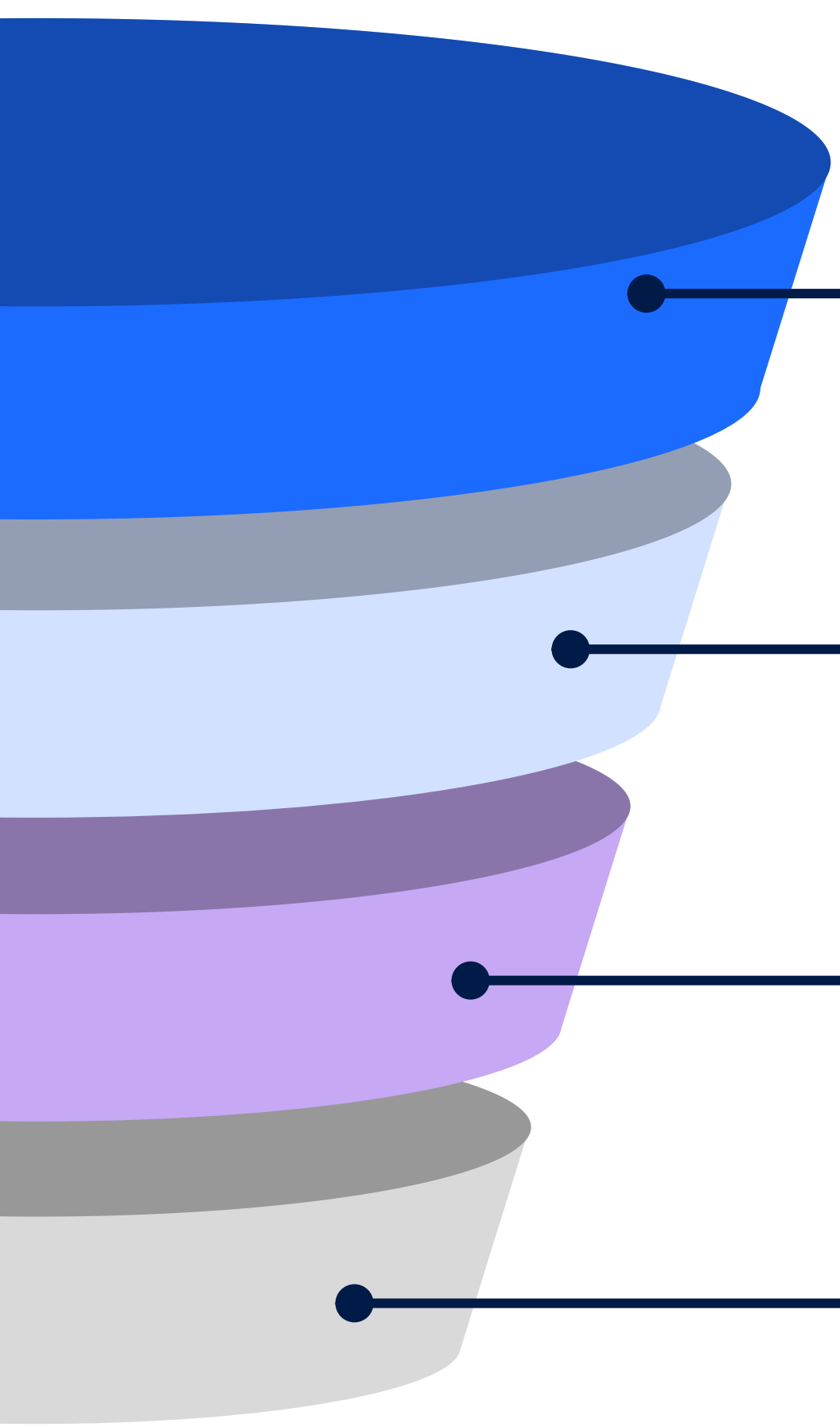
LinkedIn advertisements focus on retargeting efforts and accelerate engagement. However, as LinkedIn is the largest B2B social network, you should implement LinkedIn in its entirety, from company page and individual employee posts to newsletters, as a complementary channel to your other channels' goals.

Depending on which audience segment you're using, you may consider a different channel mix. Accounts that may not be ready to switch or accounts in the early stages of considering a switch may require high CTV and content syndication to drive brand awareness. The accounts already considering a switch that know about your brand may need less CTV and more content syndication, with display and LinkedIn ads amplifying your messaging. These accounts may also require the entire breadth of LinkedIn's capabilities, as they may be looking for deeper indications that you are the right partner for them—which may rely on social posts from company leaders that drive your positioning and thought leadership in the market.

Match the Content to Buying Stages to Increase Engagement

Each channel has primary key performance indicators (KPIs) that align with specific goals across the four stages of the buyer's journey: awareness, consideration, decision, and retention. The KPIs help you measure channel effectiveness and indicate when the account is ready to move to the next stage. Knowing where your buyers are within the buyer's journey helps you understand each persona on a deeper level, from how quickly they'll move through information to what type of content they engage with, and how you can create a competitive campaign that keeps them engaged and motivated to explore your brand as a viable solution.

Each stage has a unique goal:



In the **awareness stage**, your goal is to inform and educate your target audience about the challenges they face with their current solution and how your product can not only handle those challenges, but give them more opportunities, whether it's with their day-to-day workflow, budget, or handling scalability and flexibility as their company grows. Even if they haven't realized they have a problem yet, you want to create familiarity with your brand to stay top of mind when they're ready to find a better solution.

During the **consideration stage**, your target audience is actively evaluating solutions, making it crucial to provide detailed product information so buyers can easily distinguish your offering from competitors. Recognize competitor differentiation and help prepare buying committee members to make the case for your product based on their concerns. This could include concerns around quality, innovative technology, cost-effectiveness, fast delivery, customer service, or customization options that competitors may emphasize.

At the **decision stage**, it's imperative to equip buyers with comprehensive, digestible information that champions your solution as the optimal choice. They need to feel confident with switching to a different vendor, as the implementation process can take months from one solution to another (think of switching from Quickbooks to Netsuite, which takes months—and potentially longer—based on the complexity and cleanliness of your data).

The **retention stage** is where you can make the most out of your customers' observations and feedback to optimize future competitive campaigns. You want to dig deeper into their insights around what won them over and provide content that continues to affirm their choice to switch to your solution and avoid risking a switch to a competitor.

Re-Target and Nurture to Maintain Short- and Long-Term Engagement

Market conditions and your target account's industry play important roles in successful competitive displacement. Companies may have specific periods, such as annual budget and tech stack evaluations, where they have the opportunity to explore different tools. Particular industries and companies may have rapid purchase stages or slow periods. You need to keep an eye on market conditions and industry trends to ensure you can stay top of mind in the short and long term so that when the time comes, you make it to the top of that important Day 1 list.

The chart on the following page illustrates how you can use your paid channels to drive engagement with your target segments.

Key Takeaways

- Personalization focuses on finding buying committee members where they are with content that speaks to their interests. You need to ensure you can match accounts to where they are in terms of their buyer stage.
- Your channel mix will vary based on where your target accounts fall within your segments. Some accounts will require more brand awareness, while others may already be actively showing that they're ready to decide on a vendor, which requires messaging that displays why you're the partner of choice.
- Buying cycles are unpredictable due to various market conditions and internal factors, such as company-set buying and tech stack review cycles. Plan to retarget accounts for short- and long-term engagement to capture their attention at these opportune times.

Targeting	Segment 1, Low Intent	Segment 2, Moderate Intent	Segment 3, High Intent
Intent	Accounts matching ICP + Tech installs	Accounts matching ICP + Tech installs + Trending on solution topics	Accounts matching ICP + Tech installs + Trending on your brand/competitors
Strategy	Ideal for long-term brand awareness building	Early signs of being in-market	Actively researching a solution
Key Messaging Elements	<ul style="list-style-type: none"> • Key benefits and outcomes • Impact change can drive • Proof points 	<ul style="list-style-type: none"> • Pain points or use cases • Key benefits and outcomes • Value prop • Proof points 	<ul style="list-style-type: none"> • Why you're the right partner • What you can bring that others can't
CTV	<ul style="list-style-type: none"> • Case studies <i>*Industry specific with relevant customer logos</i>	<ul style="list-style-type: none"> • Case studies • Product hype videos <i>*Industry-specific or trending topic specific with relevant customer logos</i>	<ul style="list-style-type: none"> • Product hype videos • Product demo videos <i>*Feature head of customer success or head of product—whoever offers a stronger argument against competitors & matches persona's concerns</i>
Display	Native + videos <i>*Industry specific with messaging based on reports & trends. Feature ROI & added value where possible</i>	Videos + display <i>*Pain point-specific based on trending topic with relevant customer logos</i>	High impact videos + display <i>*Product demo videos featuring head of customer success & closely aligned with competitor pain point</i>
Content Syndication	Single touch with profiling questions <i>*Thought-leadership content can be vertical specific</i>	Double touch or HQL <i>*Case studies & solution-specific content aligned to trending topic</i>	HQL or BANT <i>*Case studies & solution-specific content aligned to competitor pain point. Choose profiling & qualifying questions to home in on pain points & needs</i>
LinkedIn	Same as display	Same as display	Same as display

**Personalization tips*

Step Three: Nurture with Compelling Content

Converting buyers to your product, especially from competitors, requires content and messaging that motivates them to engage with your brand as a serious contender for their next stage of growth. When you engage buyers with content around their role, pain points, and use case, you can establish a relationship that shows you truly understand their needs and can serve them better than other vendors in the market.

Collaborate with the Product Marketing Team to Prepare Your Content and Messaging

From white papers to blog articles, eBooks to webinars, you have ample content available to use across various campaigns. For competitive displacement campaigns, your content focuses on showcasing the unique value you provide that your competitors fail to deliver. Your product marketing team is the main point of contact to get competitive intelligence insights and solution-specific messaging, as well as assist you with designing competitive campaigns.

Product marketers are on the pulse of what competitors offer, how they advertise themselves, what customer complaints and praises for the product are, and relevant market trends and persona insights that may work in your company's favor. Partner with your product team to understand your battlecards—an important piece of messaging that indicates how you and your competitors stack up against each other in terms of offerings, functionality, and pricing. Dive deeper into your sales data to understand your win and loss data around accounts who made the switch or decided to partner with a competitor but show signs that they want to make a switch.



Depending on your product, industry, and growth stage, you may have a few heavy hitters within the marketplace. Your product team will help you identify and narrow down your competitive displacement campaigns to the competitors where you have a strong, differentiated offering and you're able to speak to a specific pain point that clients experience with competitors and how your brand can address—and solve—that pain point.

If you don't have a product marketing team, marketers can still dig into their marketing toolbox and knowledge about the marketplace to identify what competitors they can displace. Review websites like G2 aggregate client reviews and rankings into scores and badges across a variety of categories to identify industry leaders. Gartner research reports provide deep industry insights and rankings across various industries and products. Search engine optimization (SEO) tools like Semrush and Ahrefs can also compare your website's domain ranking and content statistics against competitors, which lets you quickly identify what competitors are within reach to beat, and where you have content gaps and opportunities to outrank competitors and claim more of the digital marketplace.

Follow the Rule of Threes for Strong Storytelling

Your messaging will be one of the key drivers for engagement and conversations, as it heavily focuses on your ability to displace the competition. The strength of your campaign lies in your storytelling ability—of being able to identify how your content dives into the buyer's pain points and what pieces of content convey messaging that causes a strong reaction for each committee member. Approach your messaging plan with a “rule of three” mentality for a strong foundation for engagement and compelling content.

While buyers won't remember everything they read, they will remember how they felt while engaging with your content, and you want them to keep you top of mind. Buying committee members will keep an eye out for compelling reasons to change vendors, which is why you need to ensure you can position your brand as the superior alternative. End users will care about whether managers and stakeholders would be happy with the new solution, so they need content that describes how your product impacts day-to-day tasks. C-suite and decision-makers around department budgets will care about the return on investment (ROI) for the product.

As a writing principle, the rule of three notes that information presented as a group of three tends to be more amusing, gratifying, and memorable. As a campaign principle, you can follow it to create engaging campaigns. You want to identify three personas to target. From there, you can develop messaging that highlights:

- **3 pain points**, and how your solution addresses them
- **3 strategic outcomes** that highlight your solution benefits, including impact on ROI
- **3 use cases** on how your solution addresses key pain points
- **3 proof points** that reinforce the value your solution brings

As you build out your content groups, you must constantly check in to ensure you're addressing buyer intent and clearly communicating your value propositions. Each target account and competitor solution needs messaging around how you fill the market gap—essentially, how you can offer more than your competitor offers. You must also be aware of the buying committee structure—of which buyers hold seniority and what type of influence they have on decision-making—so that you can accurately tap into their concerns and provide enablement pieces to help them persuade other committee members that you are the vendor of choice.

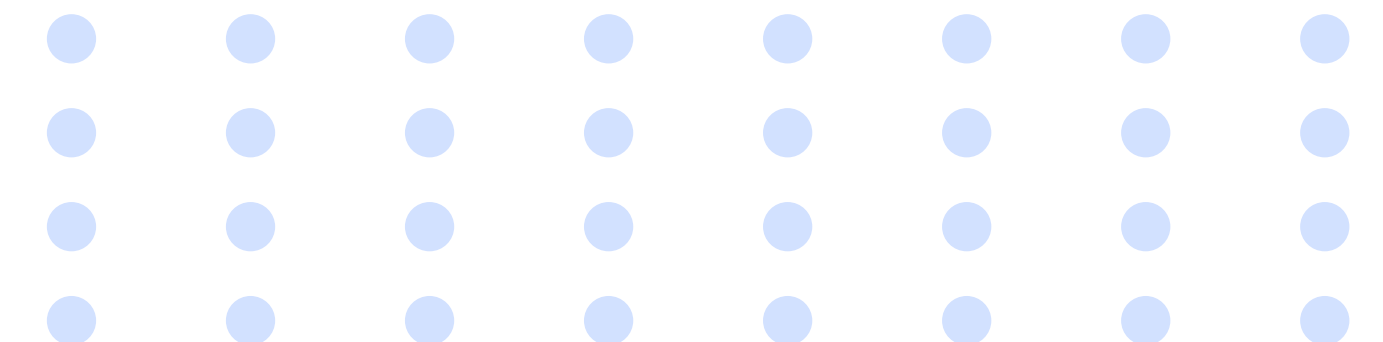
Creating your multi-channel nurture strategy serves as an opportunity to optimize your storytelling so you can quickly move buyers through the funnel. You want your messaging available across various content, from product and competitive pages on your website to your sales enablement collateral. And remember: Each piece of content doesn't need to address all three pain points at the same time. You want to create various entry points for buying committee members to engage with, as they may know about one problem and begin their research, only to discover another problem—and yet you offer solutions to solve one, the other, or, ideally, both.

Worksheet: Message Map

Target Market:	Persona A	Persona B	Persona C
Limitations of Competitive Solutions <i>Identify three limitations per competitor and match to persona concerns/position in relation to using product, price, etc.</i>	Competitor 1: Limit A: Limit B: Limit C: Competitor 2: Limit A: Limit B: Limit C:	Competitor 1: Limit A: Limit B: Limit C: Competitor 2: Limit A: Limit B: Limit C:	Competitor 1: Limit A: Limit B: Limit C: Competitor 2: Limit A: Limit B: Limit C:
Pain Points <i>Identify three pain points</i>	Pain Point 1: Pain Point 2: Pain Point 3:	Pain Point 1: Pain Point 2: Pain Point 3:	Pain Point 1: Pain Point 2: Pain Point 3:
Value Proposition <i>Describe why your solution is better</i>			
Outcome/Overarching Value <i>Identify three outcomes</i>	Outcome 1: Outcome 2: Outcome 3:	Outcome 1: Outcome 2: Outcome 3:	Outcome 1: Outcome 2: Outcome 3:
Use Cases <i>Identify three use cases</i>	Use Case 1: Use Case 2: Use Case 3:	Use Case 1: Use Case 2: Use Case 3:	Use Case 1: Use Case 2: Use Case 3:
Proof Points <i>Identify three proof points to address pain points</i>	Proof Point 1: Proof Point 2: Proof Point 3:	Proof Point 1: Proof Point 2: Proof Point 3:	Proof Point 1: Proof Point 2: Proof Point 3:

COMPETITIVE DISPLACEMENT CAMPAIGN MESSAGING EXAMPLE

Targeting	Segment 1, Low Intent	Segment 2, Moderate Intent	Segment 3, High Intent
Intent	Accounts matching ICP + Tech installs	Accounts matching ICP + Tech installs + Trending on solution topics	Accounts matching ICP + Tech installs + Trending on your brand/competitors
Strategy	Ideal for long-term brand awareness building	Early signs of being in-market	Actively researching a solution
Messaging	Educational and insight-based content Ex: Industry data, reports, white papers, webinars, buyer guides	Use case content focused on pain points, why change Ex: Case studies, ROI calculators, blogs, webinars, infographics, videos, demo & free trials, product launch	Use case and product plays content Ex: ROI calculators, product launch, TEI sheets, product sheets, case studies, onboarding & implementation guides, competitive landing pages or sheets, vendor evaluation cheat sheets, demo & free trials
Action You Want Buyers to Take	Drive website visits to your resources page, drive attendance to webinars or meet at tradeshow	View your product pages, review your technical documentation, demo your solution	Demo your solution, talk to the sales team, test any available tools



Implement a Multi-Channel Strategy to Stay Top of Mind

Your competitive displacement campaign should be applying a multi-channel ABM approach so you can find your target accounts and deliver the right message where they are at the right time. While you can build nurture flows into your content strategy, you need to find ways to stay top of mind as target accounts may lose track of your brand due to their day-to-day priorities or because your competitors are also trying to get their attention. Use display advertising and LinkedIn Ads as a retargeting strategy to increase the frequency of touchpoints.



Trending topics can be pushed to your MAP systems to help you automate routing accounts into the right nurture flows. Alternatively, they can be provided through an Excel spreadsheet with your leads.

Introduce account scoring in your nurture program to create a more streamlined account journey with your brand. Account scoring can also include account engagement with media channels to build a more accurate picture of your accounts' affinity to your brand.

You don't want to try and pack every piece of content and every bit of messaging into your nurture flows—it becomes too complex and muddies the story you're telling, which causes buyers confusion and a reason to disengage. Instead, start small with your strongest messaging and pieces of content. You can always expand later.

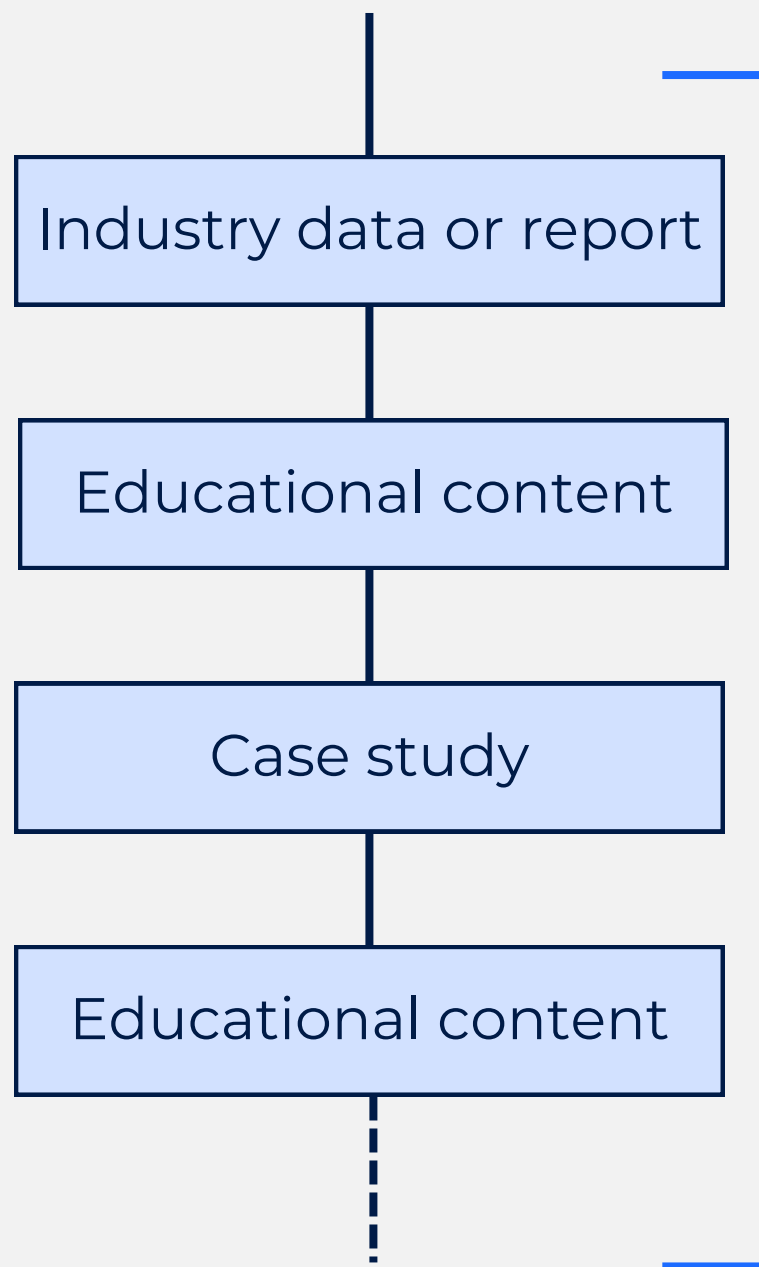
And when you are ready to create more advanced email nurture flows, add a level of personalization:

- Industry personalization for the broad target
- Trending topic personalization for the middle targets
- Competitive-specific product personalization, objection to purchase, and/or pain point specific for the narrow target

You can lean on your intent, engagement, and demographic data to determine where buyers fall within these advanced strategies, and how you can implement these paths into your current nurture flow.

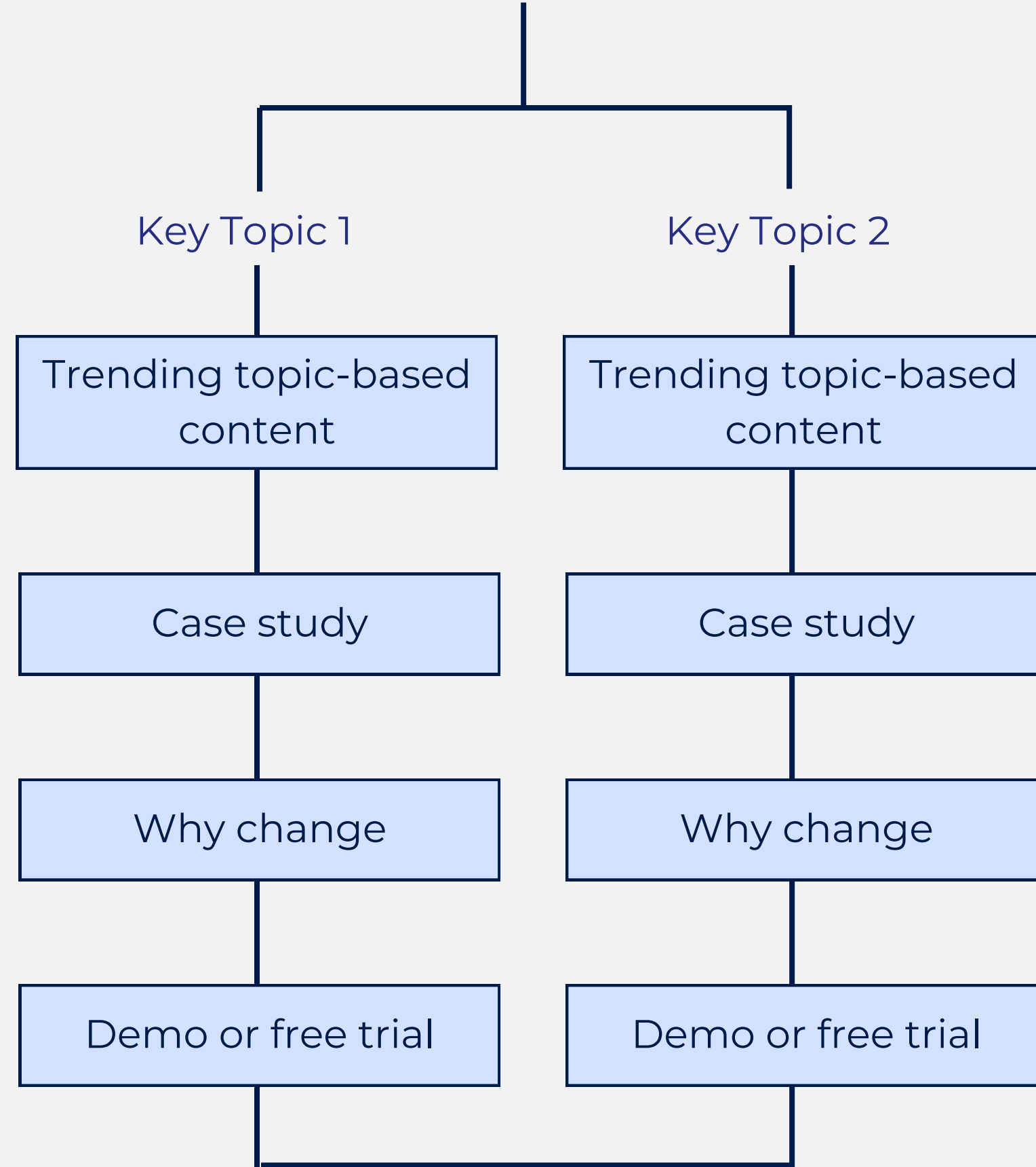
See the next page for an example of an email nurture flow ideally running at the same time as your media campaign.

Segment 1, Low Intent



Any engagement move to next nurture flow

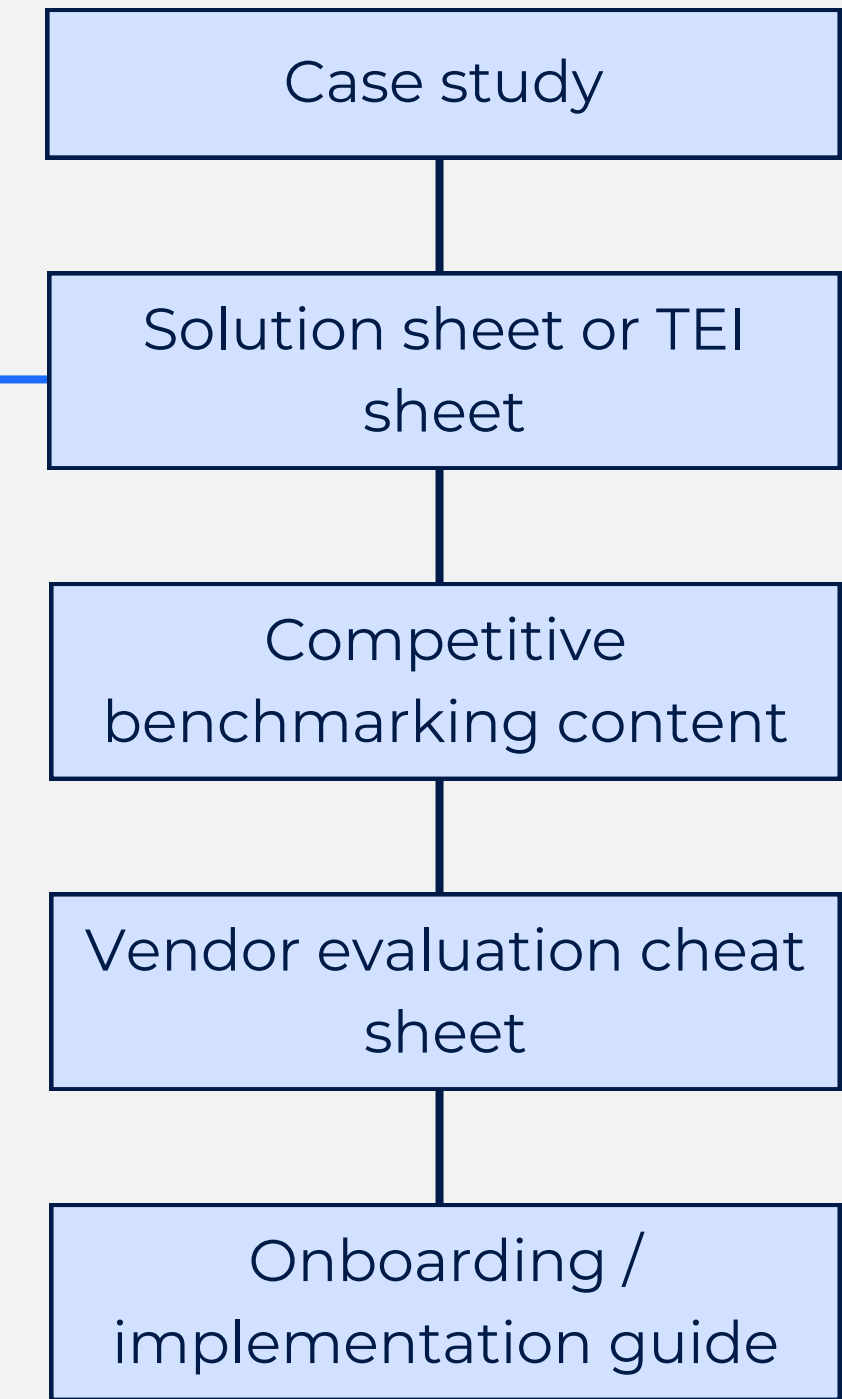
Segment 2, Moderate Intent



No engagement move to higher level nurture

Any engagement
Sales conversation

Segment 3, High Intent

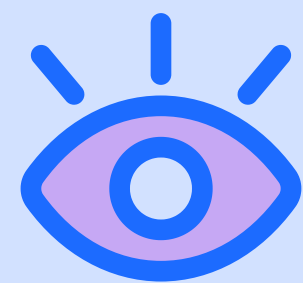


No engagement move to higher level nurture

Any engagement
Sales conversation

Align with the Sales Team on Content and Messaging

Engaging with a campaign's assets is one thing. If buyers don't converse with the sales team, you lose out on the momentum and engagement from your marketing efforts. Sales and marketing alignment requires constant conversations around competitors, win and loss data, and what accounts show promising engagement that will yield into those important conversations that help get buyers to convert into customers.



Give the sales team visibility into account penetration and engagement with media channels. Accounts that are heavily engaged can then be prioritized for outreach. And while you may not run into this as frequently with competitive displacement campaigns, the sales team still needs to ensure that marketing understands the qualification and scoring metrics sales use to ensure buyers that your product can serve the buyers' needs better. Account scoring can help with automating the handover process with sales, but you still need to align with sales on any specific accounts they're looking to break into or verticals they'd like to focus on. Knowing what accounts are on the sales team's wish list allows you to quickly flag these accounts when they engage with marketing collateral.



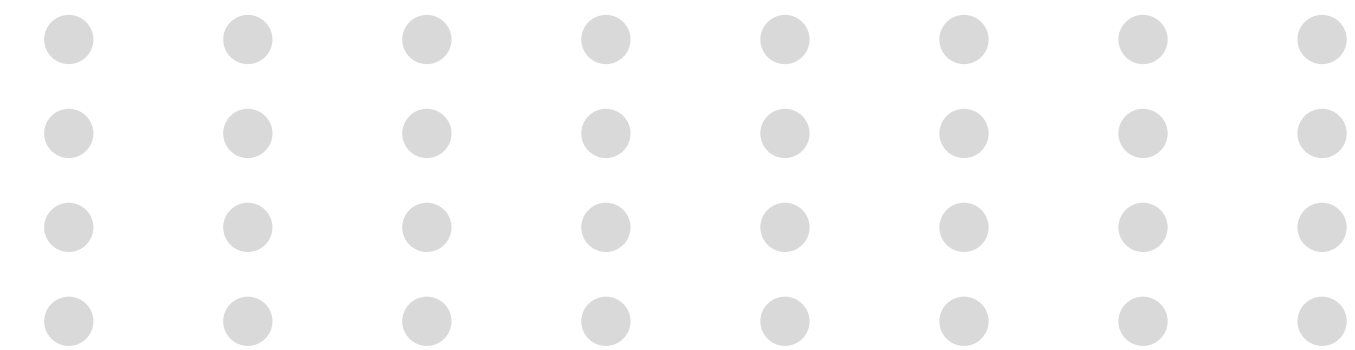
Align with sales on messaging. Sales playbooks are essential to ensure messaging remains consistent across the sales team. Playbooks incorporate your value prop, key benefits, audiences, their needs, objection handling, unique differentiators vs. specific competitors, and an outline of related assets that sales can use as enablement materials to effectively speak about your solution versus competing products. Marketing can also help sales team members craft engaging, personalized outreach messages with trending topics, competitive research, and key talking points on why buyers are having problems rather than asking buyers what those problems and pain points are.



Include the customer success team alongside the sales team in conversations about winbacks from inactive customers or customers who went to a competitor. Find out why the customer left or became inactive so you can craft a nurture campaign with the right mix of content that will compel them to engage with your brand.



You may also consider introducing some monetary value within your outreach. Whether it's a discount, free trial period, or value add, such as additional features or services (like free monthly consulting if you sign up for a 12-month contract for a quick win if necessary). Depending on your product and functionality, marketing can promote this special deal within their campaigns, which allows you to establish credibility and trust with a new account or remind past customers why they enjoyed working with your product in the first place.



Key Takeaways

- Collaborate with your product marketing team to identify the content that will drive competitive displacement. If you don't have a product marketing team, rely on data from your CRM to see reasons for account wins and losses against competitors, as well as intent data to identify topics for your campaigns.
- Your campaigns don't have to contain everything. Follow a rule of threes—three personas, with three specific pain points, outcomes, use cases, and proof points—to create your campaigns.
- Nurture campaigns should start with your strongest piece of messaging to continue engaging the account.
- Align with your sales team to understand account scoring and signals of accounts moving from one stage to the next within the buyer's journey. Sales may also have target accounts in specific industries or verticals they'd like to focus on. Find out what's on their wish list so you can keep an eye on the accounts' engagement with campaign collateral.

Step Four: Track the Key Metrics to Accelerate Conversion

Measuring metrics goes beyond simple win or loss numbers. You need to identify the metrics that matter to your business and help you discover proactive, strategic insights that lead to actionable optimizations that lead to better-performing competitive displacement campaigns.

The buyer's journey is full of different stages, each with their own engagement metrics and signals for seeing how buyers progress along the funnel as individuals and a collective account. Marketing and sales need to deeply understand these signals to see how accounts progress.

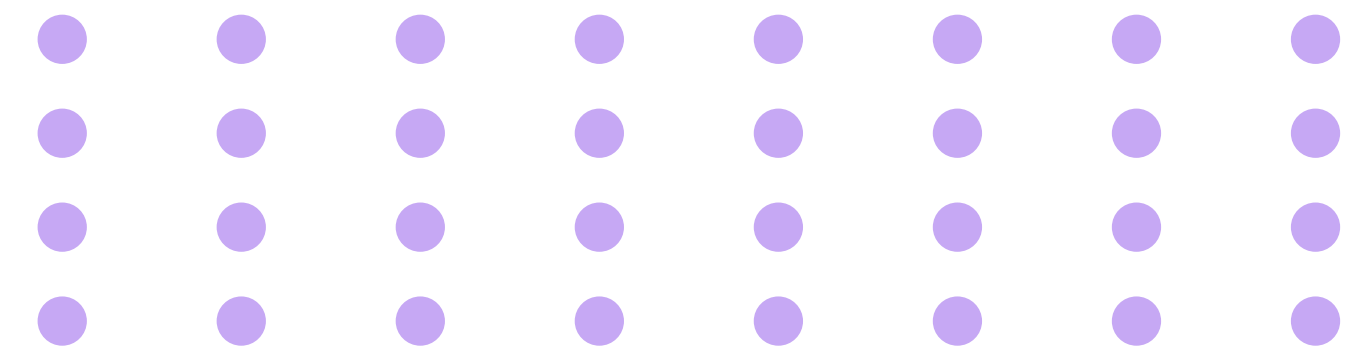
Each target segment may move at their own pace. For example, the accounts using a competing solution but not looking to switch have a long journey ahead of them. It's up to the marketing team to get these buyers to realize they need to make a switch, which takes massive effort. It makes sense, then, to choose a lower level of KPIs, such as impressions and reach, so you can see how brand awareness is building toward fuller, richer engagement.

For accounts in the early stages of switching to another vendor, you want to keep an eye on how much they interact with the sales team, as it's a strong indicator of account penetration and engagement. And for the accounts that are about to decide on a vendor to switch to, you want to investigate the impact of the deal and track it against the opportunity. What does the opportunity look like to convert that account, and what impact will their business have on your company's goals?



Competitive Displacement Campaign KPIs to **Track**

Targeting	Segment 1, Low Intent	Segment 2, Moderate Intent	Segment 3, High Intent
Media Engagement	<ul style="list-style-type: none"> • Impressions • Accounts reached • Clicks, # leads per account, video completion rate (VCR) 	<ul style="list-style-type: none"> • Account penetration • Account engagement • Website visits 	<ul style="list-style-type: none"> • Website visits • Pipeline creation • Conversion
Nurture Engagement	<ul style="list-style-type: none"> • Email clicks/opens • Website visits • Account scoring progress 	<ul style="list-style-type: none"> • Website visits • Account scoring progress 	<ul style="list-style-type: none"> • Website visits • Account scoring progress • SQL creation
Sales Engagement	MQL > SAL	SAL > SQL	SAL > SQL > Opportunity



Measuring against competitors comes down to figuring out how you can track market share. Here are the key metrics that allow you to gain a sense of your market share:

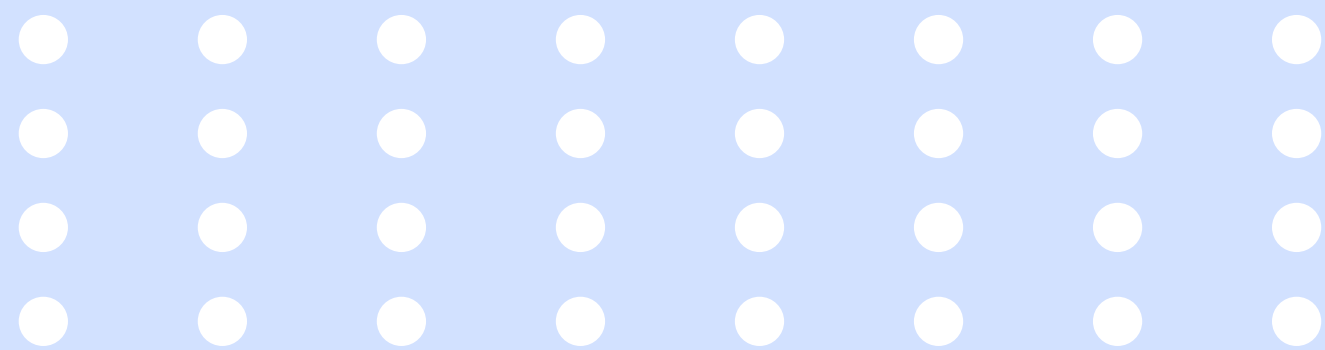
- **Win Rate:** The percentage of deals won divided by your total deals. You can dive deeper into this metric by tracking your competitive win rate, which looks at the number of deals you gained against specific competitors. You can also find which competitors you won against through client notes and intent data.
- **Competitive Content Engagement Tracking:** Review what content is driving the best engagement with your target accounts. Look into your click-through rates (CTR), impressions, email opens and clicks within emails, number of asset downloads, and sessions to see what content is driving engagement.
- **Competitive Deal Support Requests:** Requests from your sales and customer success teams are leading indicators of your competitive displacement program and who needs assistance. Track what type of content is requested and optimize how you can give these teams better access to answers or enablement materials. Alert your product marketing team if you need to develop new messaging or update battlecards so everyone remains on the same page.

Key Takeaways

- Competitive displacement metrics and KPIs rely on a variety of factors, including what stage of the buyer's journey accounts are in.
- You need to be able to track metrics against your competitors' market share. Investigate your win/loss rate, content engagement, and support requests from your customer success and sales teams to identify where you place yourself against competitors.
- Use this data to optimize campaigns, whether that's updating content or changing content out for top-performing pieces.

See Competitive Displacement in **Action**

You have the steps—now it's time to put them all together. Let's follow JetTech, a fake quantum AI company, as they put together their competitive displacement campaign.

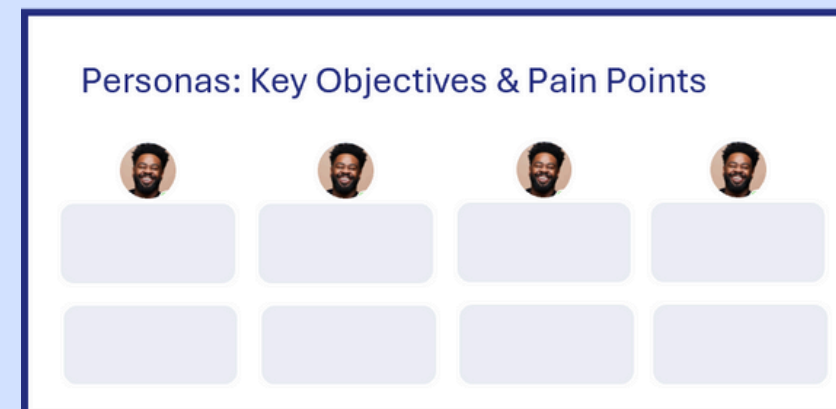
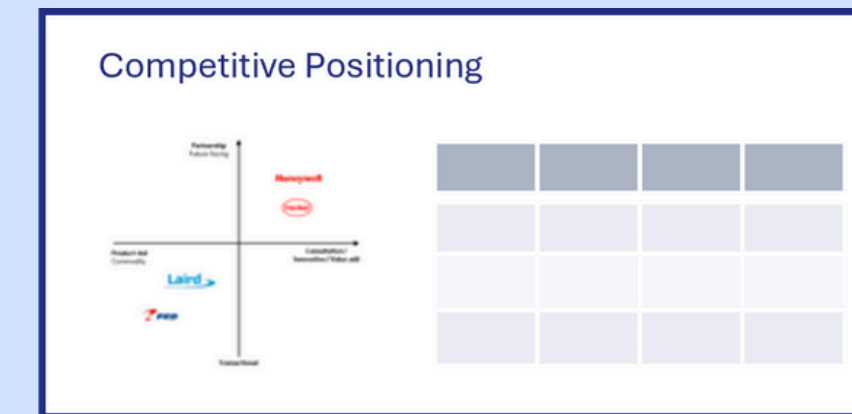
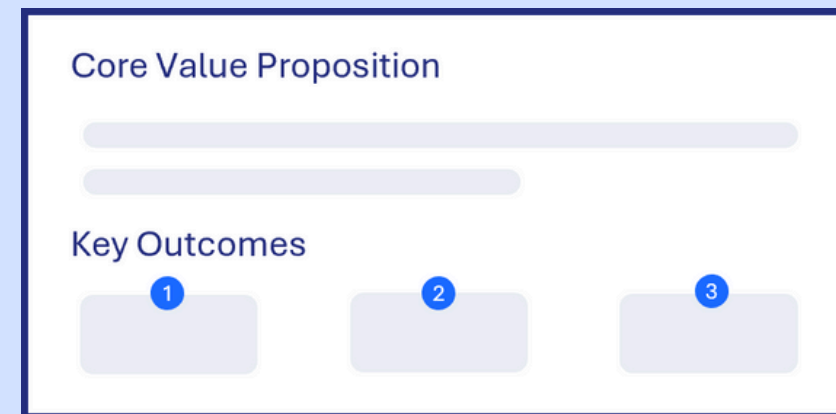


VALUE PROPOSITION

JetTech revolutionizes industries with quantum AI, delivering unparalleled computational power, autonomous systems, and ethical frameworks for tailored, secure, and efficient solutions.

Sales Enablement Tools

Sales Messaging Playbook



Battlecards



Sales Presentation



Cheat Sheets & FAQs



TARGET ACCOUNT LISTS

FINANCE

HEALTHCARE

Unactivated

- Revenue: Above \$1,000,000
- Tech installs: QuantumNext AI
- Accounts visited website in the last 6 months and lookalikes

- Revenue: Above \$10,000,000
- Sub-vertical: hospitals – 100+ beds
- Tech installs: QuantumNext AI
- Accounts visited website in the last 12 months and lookalikes

Early Stage

- Revenue: Above \$1,000,000
- Tech installs: QuantumNext AI
- Accounts trending on quantum computing, AI, automation
- Accounts opened at least 3 emails

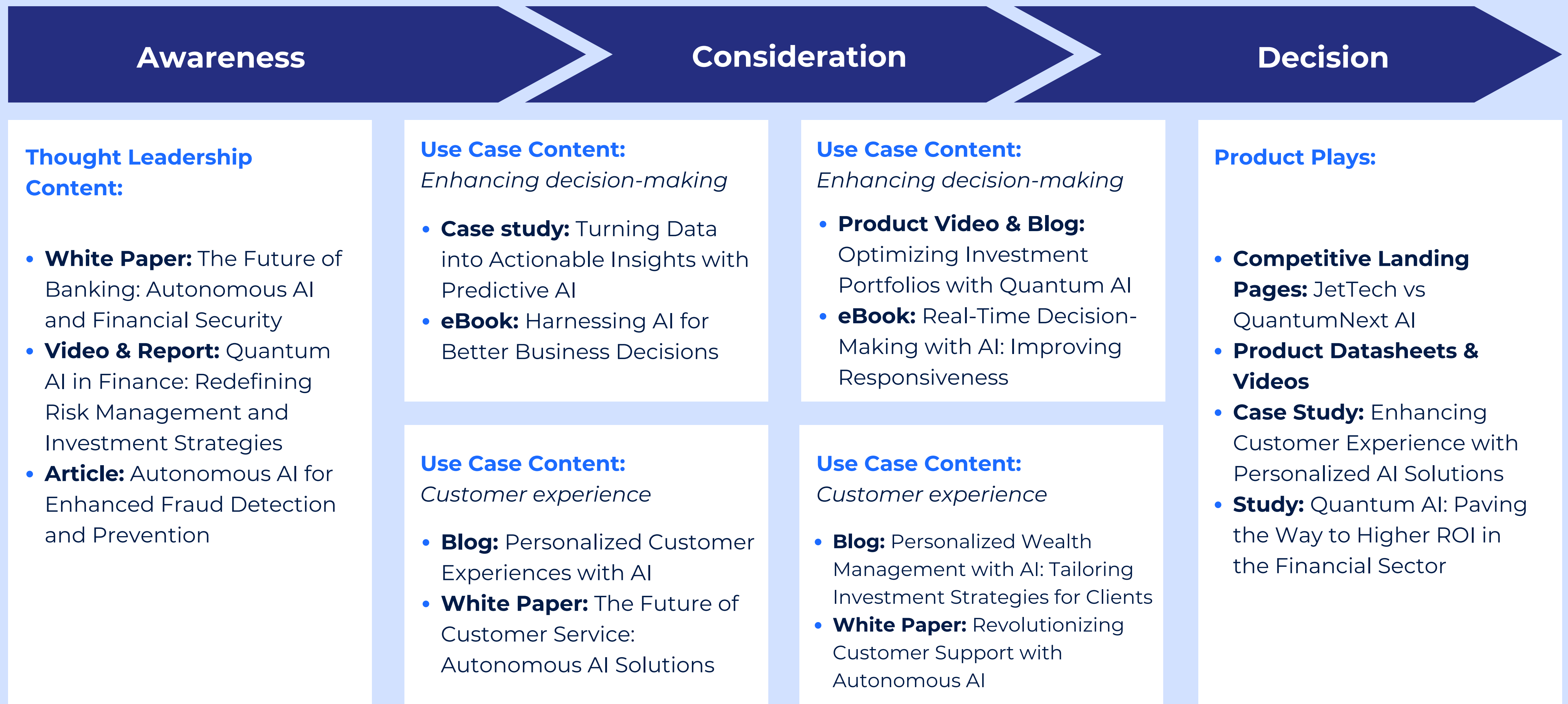
- Revenue: Above \$1,000,000
- Tech installs: QuantumNext AI
- Accounts trending healthcare tech, healthcare AI, automation
- Accounts opened at least 3 emails

In-Market

- Revenue: Above \$1,000,000
- Tech installs: QuantumNext AI
- Accounts trending on quantum computing, AI, automation, NextGen AI or QuantumNext AI

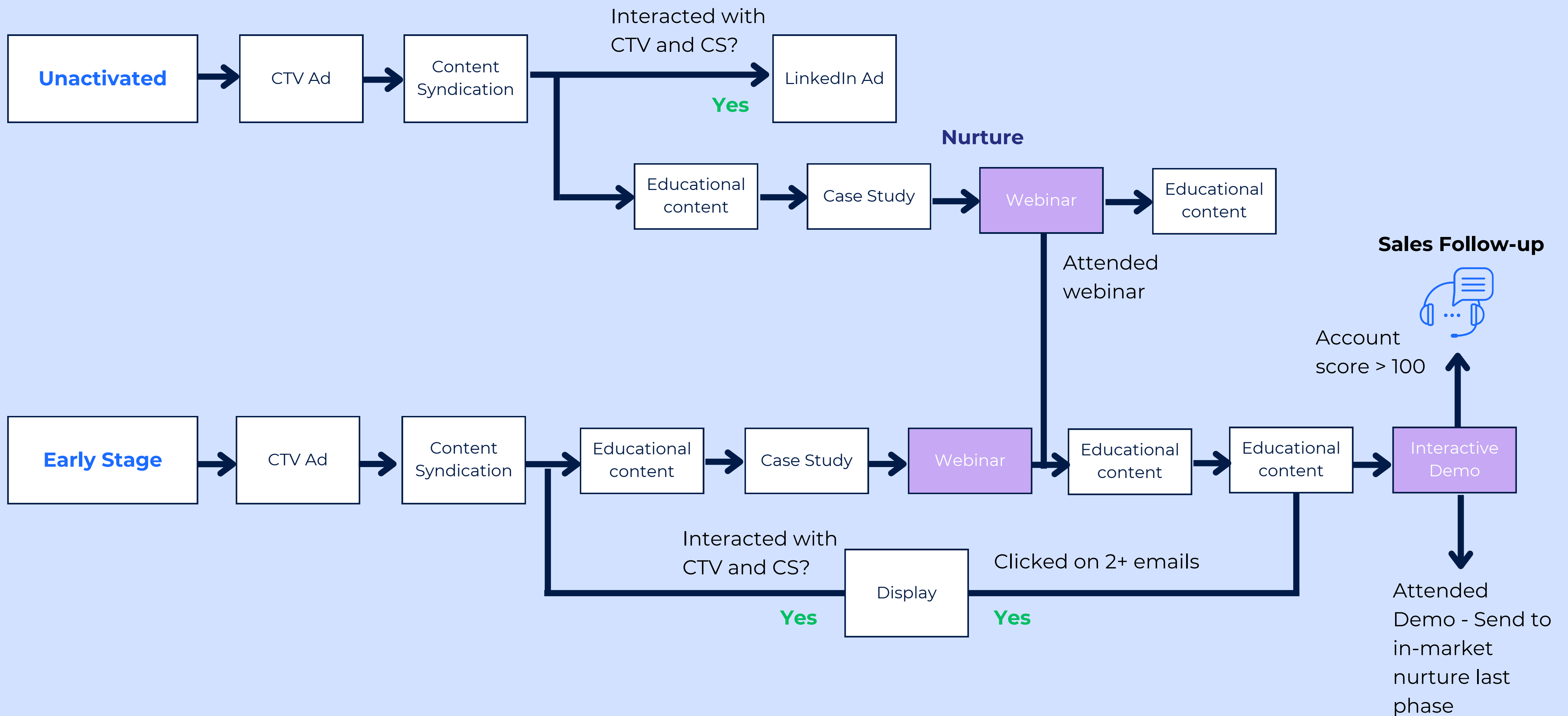
- Revenue: Above \$1,000,000
- Tech installs: QuantumNext AI
- Accounts trending on healthcare tech, healthcare AI, automation, NextGen AI or QuantumNext AI

CONTENT STRATEGY: FINANCE

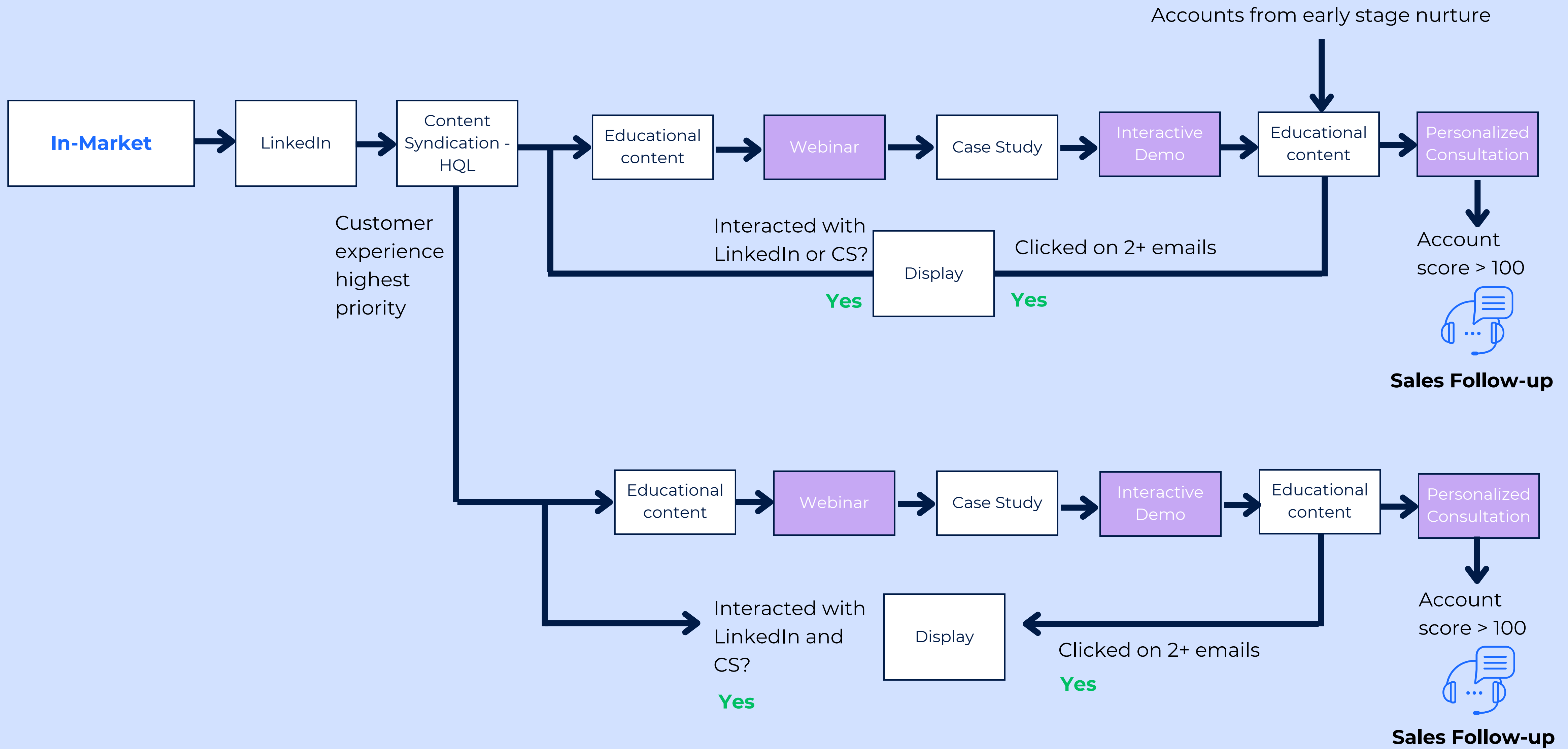


CTAs:  Webinar Attendance  Interactive Demo  Personalized Consultation

THE FINANCE BUYER JOURNEY: BY ACCOUNT ACTIVITY



THE FINANCE BUYER JOURNEY: BY ACCOUNT ACTIVITY



ACCOUNT SCORING

Category	Activity	Score
Media engagement	CTV – VCR >95%	20
	Content Syndication	20
	Content Syndication – HQL	30
	LinkedIn – click, share or comment	10
	Display >100 impressions	10
	Display click	10
Nurture	Email open	5
	Email click	10
	Product email clicks	30
CTAs	Webinar attendance	50
	Interactive demo	100
	Personalized engagement	100

Get Into Fighting Shape Against Your Competitors with ABM Campaigns **Powered by Madison Logic**

You and your competitors may have the same target accounts in mind, but there's another bridge that connects your companies: Sales cycles are constantly affected by economics and the state of the marketplace. To seize more of your market share, despite these conditions, you need to ensure that you can continuously stay ahead of your competitors. One way to do that is through continuous competitor research, constant analysis of intent and technographic data, and cross-collaboration between your sales and customer success teams to ensure your competitive displacement campaigns benefit from proactive optimization.

To get into fighting shape against your competition, you need to be able to access your CRM and MAP data as close to real time as possible. Your historical data around your win and loss rates tells one story—and it's your job to dig deeper to find out which competitors are within striking distance.

Madison Logic offers an ABM platform that not only brings your datasets into one holistic view—it powers your target audience segmenting abilities up through [ML Insights](#) and your measurement capabilities through [ML Measurement](#). ML Insights leverages intent data from over 20 million companies worldwide so you can quickly identify the demographics on the buying committee alongside the content and messaging that will speak to them. Our proprietary engagement data uncovers behavioral insights throughout your targeted accounts across the four primary media channels: content syndication, display advertising, LinkedIn, and CTV. And our third-party B2B research intent data gives you deeper insights into product research, content engagement, and account data, so you can quickly optimize your competitive displacement campaigns to capture your buyers' interests and create content that speaks to them.

ML Measurement offers proprietary reporting capabilities so you can quickly investigate marketing's impact on pipeline and ROI. Because you can integrate the platform with LinkedIn, your CRM, and MAP, you can efficiently access data across multiple channels in one view. You can then drill into target accounts' activities across channels and buying stages and compare them to your campaign benchmarks based on previous campaign performance. These datasets help lead you to deeper insights into your competitive displacement campaign strategy, how you can optimize campaigns for better performance, and how your efforts specifically contribute to your company's larger pipeline and revenue goals.

Ready to Claim More Market Share?

Suit up with Madison Logic—we'll join forces in creating proactive, data-driven, multi-channel ABM competitive displacement campaigns.

“

Using multiple channels through Madison Logic helps us engage with our targeted accounts. At first, we worked with Madison Logic on content syndication campaigns and started to get those top-of-funnel leads into our funnel. Then, for some of our verticals where we were more mature, we started running multi-touch retargeting and display ad campaigns, surrounding those engagements. Now, we are at the stage where we are looking at integrating our LinkedIn paid ads into the platform. The multi-channel approach helps us establish stronger engagements with the targeted accounts and allows them to consume our content at their own pace and through the channels that they appreciate.



Judit Szabo

Global Head of Demand Generation and Marketing Operations at Endava

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