

ABM for the Modern Marketer

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What We'll Cover

- **Part 1: Advanced Audience Building**
- **Part 2: Advanced ABM Campaigns**
- **Part 3: Advanced CRM Integrations**
- **Part 4: Advanced ABM Attribution**
- **ABM Coach: AI-Powered ABM Campaigns**

Part 1

Advanced Audience Building

Part 1: Advanced Audience Building

Traditional ABM

01 Account-Level Lists

02 Static Audiences

03 Basic Firmographics

Part 1: Advanced Audience Building

Traditional ABM



Modern ABM

01 Account-Level Lists

01 Contact-Level Lists

02 Static Audiences

02 Dynamic Audiences

03 Basic Firmographics

03 High-Quality, Double-Verified Data

Contact-Level Lists

Types of contact-level lists:

- Top down lists (intent driven)
 - Bottom up lists (psychographic driven)
 - CRM generated lists (named accounts / contacts)
 - Retargeting lists (website driven)
 - Lifecycle marketing lists (pipeline acceleration / renewals)

Top Down Example

Keywords ⓘ

- magnesium x
- ashwagandha x
- turmeric x
- melatonin x
- vitamin C x
- vitamin D x
- omega-3 x
- probiotics x
- prebiotics x
- collagen x
- biotin x
- hyaluronic acid x
- valerian root x
- reishi x
- lion's mane x
- cordyceps x
- chaga x
- ginger x
- elderberry x
- echinacea x
- L-theanine x
- rhodiola x
- maca root x
- ginseng x
- calcium x
- selenium x
- chromium x
- niacin x
- B12 x
- B6 x
- folate x
- L-tryptophan x
- green tea extract x
- apple cider vinegar x
- coQ10 x
- NAC x
- glutathione x
- aloe vera x

Update List

Accounts Found 3,184

| Acct Name | Propensity Score |
|---|------------------|
| Sunny Culture (View Intent) drinksunny.com | N/A |
| Hazlo (View Intent) drinkhazlo.com | N/A |
| Half Past (View Intent) drinkhalfpast.com | N/A |
| Dim Sum House (View Intent) dimsumhousemorrisville.com | N/A |
| Cookies By George (View Intent) cookiesbygeorge.com | N/A |
| Dakota Biotech (View Intent) dakotabiotech.com | N/A |
| Custom Collagen (View Intent) customcollagen.com | N/A |
| Collagen For Her (View Intent) | |

1797 Contacts Found

Sample Contacts: Decision Makers

| First Name | Last Name | Company | Job Title |
|------------|-----------|----------------------|--------------------------------------|
| Aaron | Sorelle | Lucky Beverage Co. | Chief Growth Officer |
| Adam | Brion | Gorgie | Vice President Of Sales |
| Adam | Johnston | Biotic Ferments | Chief Operation Officer |
| Adeel | Imrani | Vijuve | Co Founder & Chief Executive Officer |
| Aicacia | Young | Silver Fern Brand | Chief Scientific Officer |
| | | Small (\$1MM-\$10MM) | Small (10 - 49 Employees) |
| | | Small (\$1MM-\$10MM) | Micro (1 - 9 Employees) |

Bottom Up Example

Required Contact Information ⓘ

Work Email

Industries ⓘ

health care x

Company Size (Employee count)

201-500 x

Seniority

CXO x

Departments

Finance x

Persona Finder

Estimated Contacts Found 1,430

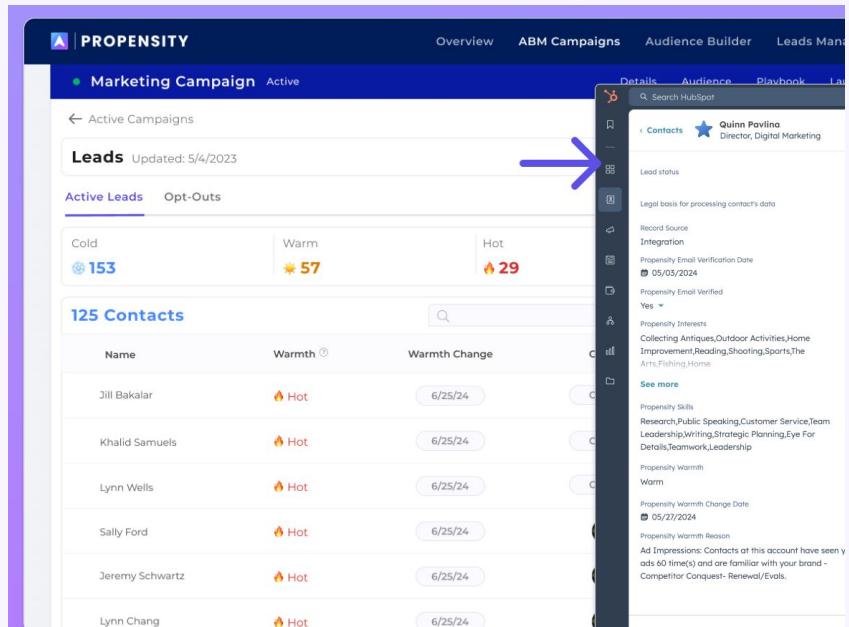
| First Name | Last Name | Company | Job Title |
|------------|-----------|--------------------------|---|
| Andrew | Pernesky | Rural Health Group, Inc. | Chief Financial Officer |
| Benjamin | Menoud | Cic Groupe Santé | Chief Financial Officer Director Of Finance, Invoicing And Insurances |
| Cindy | Cameron | Vnacare | Chief Financial Officer And Vice President Of Finance |

Retargeting List Example

| ICP Accounts Found | Leads Found | Primary Audience | Buying Circles | | |
|--------------------|----------------|--|----------------|---|-----------------------------------|
| 274 | 2,602 | Professional Services - Accounting  | 1 | | |
| Website Visits | | Search | CSV Excel | View All Leads | |
| Account | Website | ICP Account | Leads | Industry | Employees |
| Factset | factset.com |  | 10 | Finance > Portfolio Management & Financial Advice | XXLarge (10,000+ Employees) |
| Hyperproof | hyperproof.io |  | 10 | Software | Medium-Small (50 - 199 Employees) |
| Planet DDS | planetdds.com |  | 10 | Software | Medium (200 - 499 Employees) |
| Pax8 | pax8.com |  | 10 | Software | Large (1,000 - 4,999 Employees) |
| Databricks | databricks.com |  | 10 | Software | XLarge (5,000 - 10,000 Employees) |

Dynamic Audiences

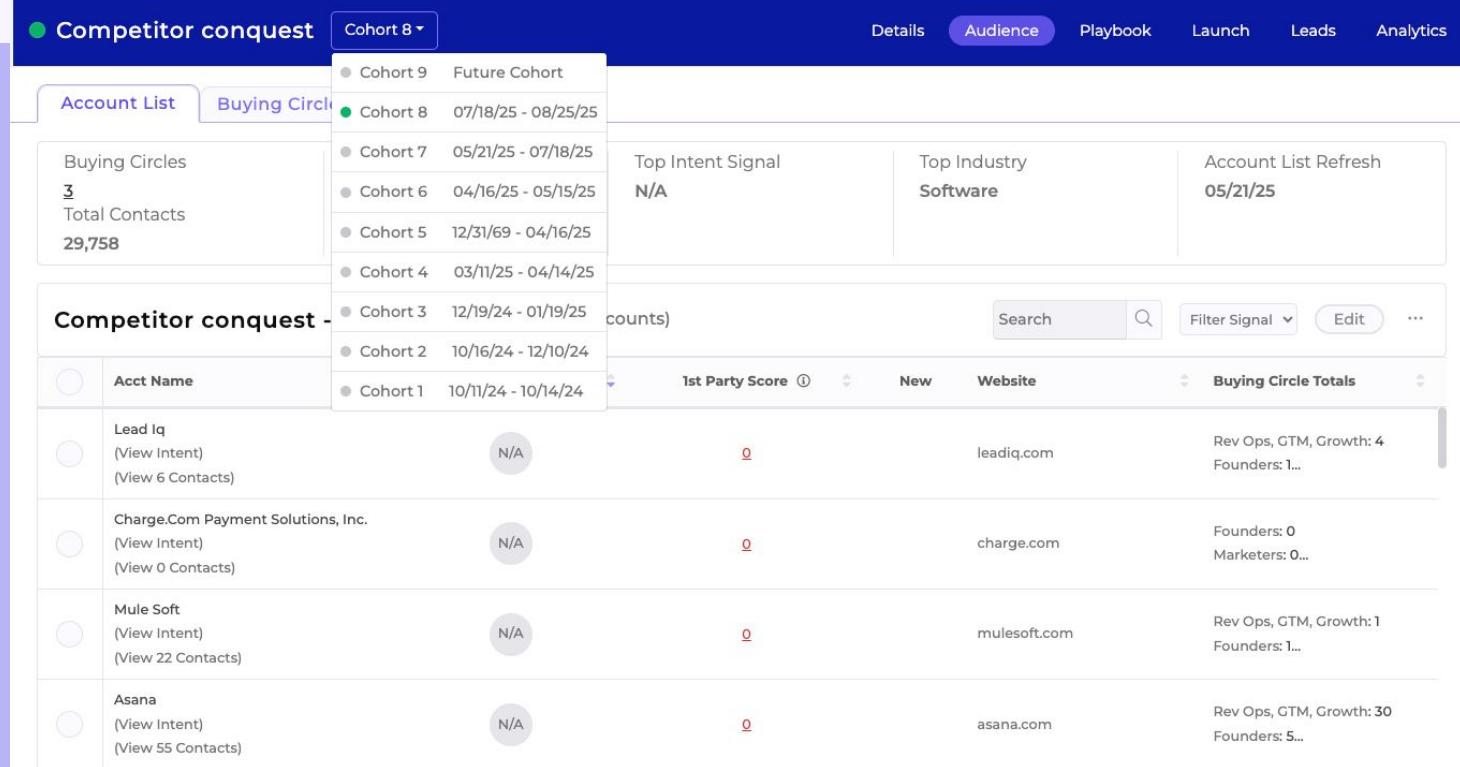
- Use natural breakpoints in your campaign to refresh your audience (and your creative)
- Use HubSpot as a list source for dynamic data
- Use recency and frequency of intent to generate in-market lists dynamically



The screenshot shows the HubSpot Propensity Marketing Campaign interface. The main area displays a list of contacts with their names, warmth scores (ranging from Cold to Hot), and the date of the last interaction. A sidebar on the right provides detailed information for a selected contact, Quinn Pavlina, including her title (Director, Digital Marketing), lead status, legal basis for processing, record source, integration, and a comprehensive list of propensity interests and skills. A purple arrow points to the sidebar, highlighting the dynamic nature of the audience data.

| Name | Warmth | Warmth Change |
|-----------------|--------|---------------|
| Jill Bakalar | Hot | 6/25/24 |
| Khalid Samuels | Hot | 6/25/24 |
| Lynn Wells | Hot | 6/25/24 |
| Sally Ford | Hot | 6/25/24 |
| Jeremy Schwartz | Hot | 6/25/24 |
| Lynn Chang | Hot | 6/25/24 |

Dynamically Refresh Audiences



The screenshot shows a marketing automation interface for a campaign titled "Competitor conquest". The top navigation bar includes tabs for Details, Audience (which is selected), Playbook, Launch, Leads, and Analytics. A dropdown menu for "Cohort 8" is open, showing the following options:

- Cohort 9 Future Cohort
- Cohort 8 07/18/25 - 08/25/25 (selected)
- Cohort 7 05/21/25 - 07/18/25
- Cohort 6 04/16/25 - 05/15/25
- Cohort 5 12/31/69 - 04/16/25
- Cohort 4 03/11/25 - 04/14/25
- Cohort 3 12/19/24 - 01/19/25
- Cohort 2 10/16/24 - 12/10/24
- Cohort 1 10/11/24 - 10/14/24

The main content area displays a list of accounts under the heading "Competitor conquest -". Each account row includes the account name, lead ID, intent signal (0), website, and a summary of founders and marketers. The account list refresh date is 05/21/25.

| Acct Name | Lead Id (View Intent) (View 6 Contacts) | 0 | leadiq.com | Rev Ops, GTM, Growth: 4 Founders: 1... |
|------------------------------------|---|---|--------------|--|
| Charge.Com Payment Solutions, Inc. | (View Intent) (View 0 Contacts) | 0 | charge.com | Founders: 0 Marketers: 0... |
| Mule Soft | (View Intent) (View 22 Contacts) | 0 | mulesoft.com | Rev Ops, GTM, Growth: 1 Founders: 1... |
| Asana | (View Intent) (View 55 Contacts) | 0 | asana.com | Rev Ops, GTM, Growth: 30 Founders: 5... |

HubSpot Generated ABM Lists

Choose Your Hubspot List

Select a HubSpot list below. To ensure data accuracy, only accounts with a 'Website' in your list will be processed.

Audience Name

Contacts in Active Deals

Hubspot List

Next-Generation Campaign - Marketers

Email Match Type ⓘ

All Emails (All personal, professional, and historic)

Audience Refresh Schedule ⓘ

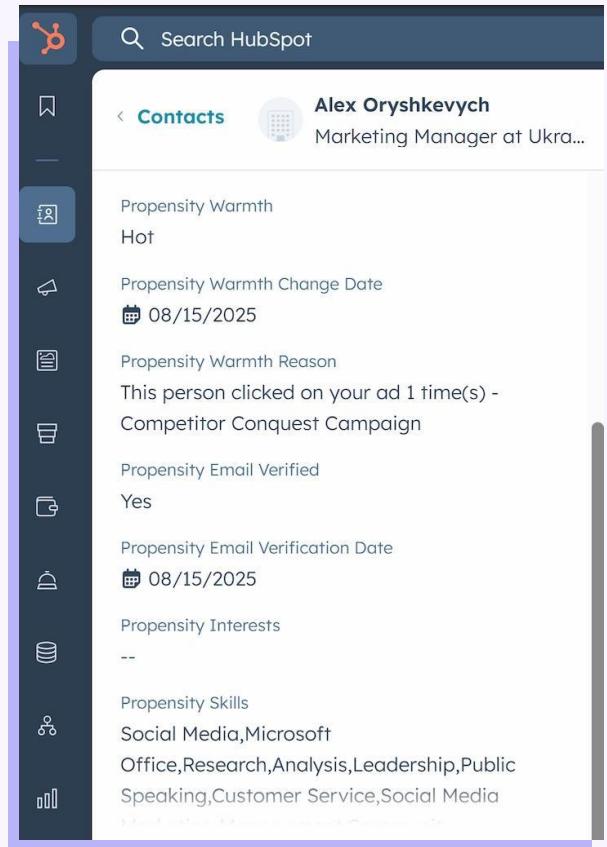
Automated Daily Refresh

Recency / Frequency of Intent

| Acct Name | Propensity Score ⓘ | 1st Party Score ⓘ | New | Website |
|---|--------------------|-------------------|-----|------------------------|
| Matter Communications, Inc. (View Intent) (View 0 Contacts) | 99 | 85 | ★ | matternow.com |
| Northwestern Mutual (View Intent) (View 0 Contacts) | 99 | 99 | ★ | northwesternmutual.com |
| Insperity, Inc. (View Intent) (View 0 Contacts) | 99 | 60 | ★ | insperity.com |
| Caterpillar (View Intent) (View 0 Contacts) | 99 | 75 | ★ | caterpillar.com |
| Air Watch (View Intent) (View 0 Contacts) | 99 | 99 | ★ | vmware.com |
| Teradata (View Intent) (View 0 Contacts) | 99 | 99 | ★ | teradata.com |

High-Quality, Double-Verified Data

- Double-verify each contact for email deliverability and employment verification
- Hand off hot leads with verified emails to sales inside HubSpot
- Add to sequences and start selling!



A screenshot of the HubSpot Contacts page. The contact is named Alex Oryshkevych, described as a Marketing Manager at Ukr... The page shows various contact details and propensity scores. The sidebar on the left includes icons for Home, Contacts, Companies, Pages, and More.

| Propensity Warmth | Hot |
|------------------------------------|---|
| Propensity Warmth Change Date | 08/15/2025 |
| Propensity Warmth Reason | This person clicked on your ad 1 time(s) - Competitor Conquest Campaign |
| Propensity Email Verified | Yes |
| Propensity Email Verification Date | 08/15/2025 |
| Propensity Interests | -- |
| Propensity Skills | Social Media, Microsoft Office, Research, Analysis, Leadership, Public Speaking, Customer Service, Social Media |

Part 2

Advanced ABM Campaigns

Part 2: Advanced ABM Campaigns

Traditional ABM

01 Account-Level Advertising

02 Limited Channels

03 Account-Level Scoring

Part 2: Advanced ABM Campaigns

Traditional ABM



Modern ABM

01 Account-Level Advertising

01 Contact-Level Advertising

02 Limited Channels

02 Full Omnichannel Campaigns

03 Account-Level Scoring

03 Contact-Level Scoring

Contact-Level Advertising

- Deliver personalized ads at the contact level across every channel
- Reduce CPL by focusing spend on contacts, not accounts

| | |
|---|---|
|  | Americu Credit Union (View Intent) (View 5 Contacts) |
|  | Ameri Health Caritas (View Intent) (View 24 Contacts) |
|  | Amgen Inc. (View Intent) (View 24 Contacts) |
|  | Ams Industries Inc (View Intent) (View 1 Contacts) |
|  | Angi (View Intent) (View 42 Contacts) |

americu.org Contacts (5)

Below are the contacts associated with this account for this audience.

[Excel](#)[CSV](#)

| Buying Circle(s) | First Name | Last Name | Job Title |
|------------------|------------|-----------|----------------|
| Marketers | Matthew | | Marketing Ass |
| Marketers | Matt | | Marketing And |
| Marketers | Emily | | Digital Market |
| Marketers | Jenny | | Digital Market |
| Marketers | Steve | | Chief Marketi |

| | | | |
|-----------|---------|--|----------------|
| Marketers | Matthew | | Marketing Ass |
| Marketers | Matt | | Marketing And |
| Marketers | Emily | | Digital Market |
| Marketers | Jenny | | Digital Market |
| Marketers | Steve | | Chief Marketi |

Personalized Advertising

| Play Name | Channel | Run Date | Buying Circle |
|-----------------------|---|---------------------|--|
| Google Video Ad |  Google Video Ad | 01/06/25 - 02/04/25 | Boston Celtics Fans  |
| Facebook Ad |  Facebook Ad | 01/06/25 - 02/04/25 | Marketers  |
| Programmatic Ad |  Programmatic Display Ad | 01/06/25 - 02/04/25 | Marketing Operations  |
| LinkedIn Ad |  LinkedIn Ad | 01/06/25 - 02/04/25 | Indiana Pacers Fans  |
| Programmatic CTV Ad |  Programmatic CTV Ad | 01/06/25 - 02/04/25 | Marketers, Rev Ops  |
| Programmatic Audio Ad |  Programmatic Audio Ad | 01/06/25 - 02/04/25 | Marketers, Sales Ops  |
| Google Display Ad |  Google Display Ad | 01/06/25 - 02/04/25 | Marketers  |
| Programmatic Video Ad |  Programmatic Video Ad | 01/06/25 - 02/04/25 | Marketers  |

Reduced CPL

| Campaign Name | Cohort | Status | Run Date | Accounts Targeted | Contacts Targeted | Discount | Total Cost To Date | Budgeted Total Cost | Total Pacing |
|-------------------------------------|--------|--------|--------------------------------------|-------------------|-------------------|----------|--------------------|---------------------|--------------|
| Competitor conquest | 8 | Active | July 18, 2025 - August 25, 2025 | 3,140 | 29,758 | \$-102 | \$17,421 | \$12,820 | \$42,113 |
| Professional Services - Accounting2 | 1 | Active | July 28, 2025 - August 27, 2025 | 199 | 438 | \$-160 | \$451 | \$5,742 | \$671 |
| Professional Services - Consulting | 1 | Active | July 25, 2025 - August 30, 2025 | 1,049 | 3,208 | \$-924 | \$1,461 | \$7,058 | \$3,831 |
| Professional Services - Finance | 1 | Active | July 25, 2025 - August 30, 2025 | 399 | 1,073 | \$-311 | \$672 | \$4,573 | \$1,694 |
| Professional Services - HR | 1 | Active | July 25, 2025 - August 30, 2025 | 347 | 1,227 | \$-354 | \$559 | \$6,165 | \$1,168 |
| Competitor conquest | 6 | Ended | April 16, 2025 - May 15, 2025 | 240 | 2,416 | \$-450 | \$2,254 | \$2,071 | \$2,255 |
| Competitor conquest | 7 | Ended | May 21, 2025 - July 18, 2025 | 3,143 | 29,768 | \$-161 | \$27,205 | \$18,890 | \$27,205 |
| Competitor conquest - Oct 2024 | 1 | Ended | October 11, 2024 - October 14, 2024 | 486 | 3,645 | \$-589 | \$1,338 | \$3,670 | \$1,338 |
| Competitor conquest - Oct 2024 | 2 | Ended | October 16, 2024 - December 10, 2024 | 582 | 12,378 | \$-1,758 | \$5,899 | \$2,698 | \$5,899 |
| Competitor conquest - Oct 2024 | 3 | Ended | December 19, 2024 - January 19, 2025 | 875 | 20,404 | \$-2,276 | \$7,301 | \$7,959 | \$7,301 |
| Competitor conquest - Oct 2024 | 4 | Ended | March 11, 2025 - April 14, 2025 | 10 | 666 | \$-192 | \$0 | \$-192 | \$-9 |
| Inbound24 Agency Attendees | 1 | Ended | June 20, 2024 - July 17, 2024 | 476 | 651 | \$0 | \$1,073 | \$1,000 | \$1,073 |
| Marketers by Name - Jennifer | 1 | Ended | January 31, 2025 - March 9, 2025 | 5,241 | 4,240 | \$-1,355 | \$857 | \$3,686 | \$857 |

Full Omnichannel Campaigns

Potential Channels

- Essential
 - Marketing Emails
 - Facebook / Instagram
 - LinkedIn
 - Programmatic Display
- Advanced
 - Reddit
 - Direct Mail
 - CTV / Audio / OTT Video
 - YouTube
 - Google Video

| Propensity Marketing Data By Account | | | |
|--------------------------------------|-------------------------|----------------------------|--------------------------------------|
| COMPANY NAME | PROPENSITY CHANNEL | PROPENSITY ENGAGEMENT TYPE | (SUM) PROPENSITY ENGAGEMENT QUANTITY |
| 10vpn hosting | facebook | clicks | 46 |
| armanino | programmatic display ad | clicks | 16 |
| teradata | programmatic display ad | clicks | 11 |
| horizon next | linkedin | clicks | 8 |
| bazaarvoice | programmatic | clicks | 6 |
| mckesson | programmatic display ad | clicks | 6 |

Contact-Level Channels

| Play Name | Channel | Run Date | Buyer Segment |
|--|---------------------------|---------------------|---------------|
| Switching ABM vendor | ✉️ Direct Mail | 03/14/25 - 03/16/25 | Marketers |
| Exploring - Propensity vs | 🎥 Programmatic Video Ad | 03/13/25 - 04/15/25 | Marketers |
| Switching | 🔗 LinkedIn Ad | 03/13/25 - 04/15/25 | Marketers |
| Exploring - Propensity vs - Switching | 🌐 Google Display Ad | 03/13/25 - 04/13/25 | Marketers |
| Exploring - Propensity vs - Switching | 📍 Programmatic Display Ad | 03/13/25 - 04/13/25 | Marketers |
| Exploring - Propensity Vs. - switching | 🌐 Facebook Ad | 03/13/25 - 04/12/25 | Marketers |
| 5 Reasons | 🌐 Facebook Ad | 03/13/25 - 04/12/25 | Marketers |
| 5 Reasons | 🌐 Facebook Carousel Ad | 03/13/25 - 04/12/25 | Marketers |
| Propensity vs | 🌐 Facebook Carousel Ad | 03/13/25 - 04/12/25 | Marketers |
| Audio Ad | 🔊 Programmatic Audio Ad | 03/13/25 - 04/06/25 | Marketers |

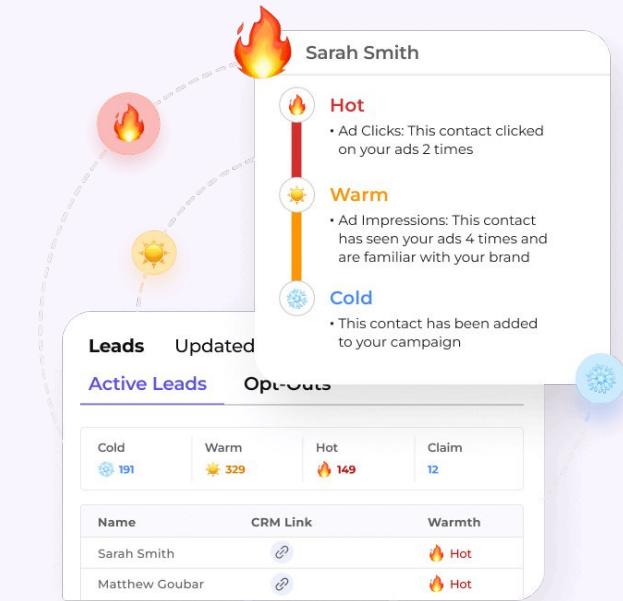
- Direct Mail
- Facebook Ad
- Facebook Carousel Ad
- Facebook Video Ad
- Google Display Ad
- Google HTML5 Ad
- Google Video Ad
- LinkedIn Ad
- LinkedIn Carousel Ad
- LinkedIn Video Ad
- Marketing Email
- Programmatic Audio Ad
- Programmatic CTV Ad
- Programmatic Display Ad
- Programmatic HTML5 Ad
- Programmatic Video Ad
- Reddit Ad
- Reddit Carousel Ad
- Reddit Video Ad

Start Date End Date

[Cancel](#) [Save](#)

Contact-Level Scoring

- Score individual contacts based on behavior, intent, and fit
- Prioritize outreach to the warmest, most engaged prospects
- Help sales focus on the contact most likely to convert



Contact-Level Scoring

Contact Activity History

| Activity Type | Activity Date | Activity Level | Domain |
|----------------------------|----------------|----------------|------------------|
| Programmatic Ad Impression | 06-01-25 17:24 | Contact | quickcountry.com |
| Programmatic Ad Impression | 06-01-25 17:24 | Contact | quickcountry.com |
| Programmatic Ad Impression | 06-01-25 17:23 | Contact | krocnews.com |
| Programmatic Ad Impression | 06-01-25 17:22 | Contact | krocnews.com |
| Programmatic Ad Impression | 06-01-25 17:22 | Contact | krocnews.com |
| Programmatic Ad Impression | 06-01-25 17:22 | Contact | krocnews.com |

CSV | Excel

4,448 Active Leads

| Name | CRM Link | Warmth | Warmth Change | Last Engagement |
|-----------|----------|--------|---------------|-----------------|
| Katherine | 🔗 | Hot | 06/01/2025 | 06/02/2025 |
| Olga | 🔗 | Hot | 04/03/2025 | 06/02/2025 |
| Paul | 🔗 | Hot | 04/03/2025 | 06/02/2025 |
| Scott | 🔗 | Hot | 04/03/2025 | 06/02/2025 |
| Emily | No Email | Hot | 04/03/2025 | 06/02/2025 |
| Gianna | No Email | Hot | 04/03/2025 | 06/02/2025 |

Cold **841**

Warm **3,336**

Hot **271**

Claimed **1**

Part 3

Advanced CRM Integrations

Part 3: Advanced CRM Integrations

Traditional ABM

01 Siloed Sales / Marketing Tools

02 Limited ABM Data in CRM

03 Manual Sales Handoff

Part 3: Advanced CRM Integrations

Traditional ABM



Modern ABM

01 Siloed Sales / Marketing Tools

01 Fully Integrated ABM Engine

02 Limited ABM Data in CRM

02 Every ABM Data Point Syncs to CRM

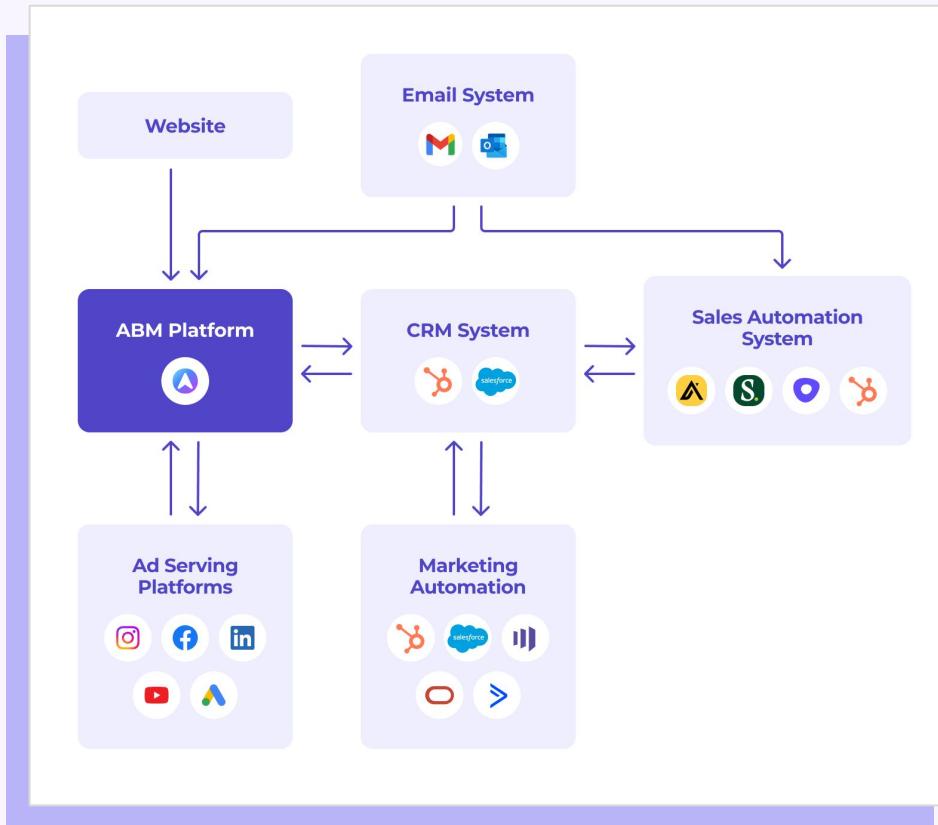
03 Manual Sales Handoff

03 Automated Sales Alerts and Sync

Fully Integrated ABM Engine

- HubSpot is the centerpiece of the ABM Engine
- ABM data should seamlessly flow into HubSpot
- Bidirectional syncing allows HubSpot to be used as a CRM and a data source for your ABM campaigns

Fully Integrated ABM Engine



Every ABM Data Point Syncs to CRM

- Push accounts, contacts, impressions, clicks, and website visits directly into HubSpot
- Keep sales in the CRM, don't make them go to another tool
- Customize reporting in HubSpot, no need to go elsewhere

ABM Data in HubSpot

The screenshot shows the HubSpot Companies page for the company "Snyk". The main content area displays the "Property list" for the Snyk account. The list includes the following data points:

| Propensity Account | Propensity Account Warmth | Propensity Account Warmth Change |
|---|-------------------------------|----------------------------------|
| Yes | Hot | 06/25/2025 |
| Propensity Account Warmth Reasons | Propensity Annual Revenue | Propensity Industry |
| Ad Impressions: This person saw your ads 18 time(s) - Competitor conquest | -- | Media & Internet > Publishing |
| Propensity Employee Count | Propensity Score | Propensity Website Visit Score |
| Large (1,000 - 4,999 Employees) | 82 | 0 |
| Propensity Intent Signals | Propensity Competitor Signals | Propensity Account Last Updated |
| Marketing Tips, B2B Sales Acceleration, Marketing Tips, Marketing | -- | 08/18/2025 |

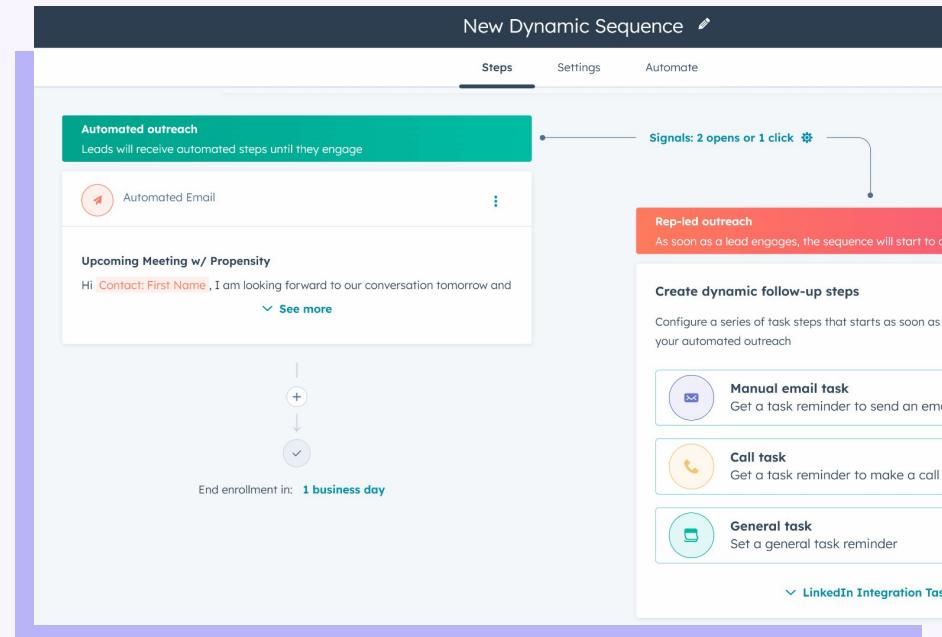
Below the property list, there are "See more" buttons for both the "Property list" and "Associated Propensity Marketing Data".

The right sidebar shows a summary of associated data:

- Contacts (1)
- Propensity Account Summary (0)
- Associated Propensity Marketing Data (8)
 - programmatic-2025-07-05 00:00:00 UTC-snykio-impressions
 - Propensity Engagement Type: Impressions
 - Propensity Engagement Quantity: 9
 - Propensity Engagement Date: 07/05/2025
 - Company
- programmatic-2025-07-04 00:00:00 UTC-snykio-impressions
- Propensity Engagement Type: Impressions
- Propensity Engagement Quantity: 13
- Propensity Engagement Date: 07/04/2025
- Company
- programmatic-2025-06-29 00:00:00 UTC-snykio-impressions
- Propensity Engagement Type: Impressions
- Propensity Engagement Quantity: 8
- Propensity Engagement Date: 06/29/2025
- Company

Automated Sales Alerts and Sync

- Instantly notify sales when high-intent activity happens
- Choose to sync only validated contacts with accurate, up-to-date details
- Deliver sales a clean, actionable pipeline every time



Sales Alerts Outside of HubSpot

ⓘ Add an Alert to Notify Your Team
Send alerts to notify your Sales Team when a contact becomes hot or visits your website.

Alerts

| Alert Target | Alert Criteria | Alert Description |
|--------------|--|--|
| Salesloft | Lead Becomes Hot (Account Centric Scoring) | Sending Lead Becomes Hot (Account Centric Scoring) alerts to Salesloft |
| Salesloft | Website Visit | Sending Website Visit alerts to SalesLoft |
| Salesloft | Website Visit | Sending Website Visit alerts to SalesLoft |
| Slack | Website Visit | Sending Website Visit alerts to Slack Channel - abm-alerts |
| Slack | Website Visit | Not Connected To Slack Channel |
| Email | Website Visit | Sending Website Visit alerts to - spencer@propensity.com,carla@propensity.com |
| Email | Lead Becomes Hot (Account Centric Scoring) | Sending Lead Becomes Hot (Account Centric Scoring) alerts to spencer@propensity.com,carla@propensity.com |
| Email | Website Visit | Sending Website Visit alerts to - |

Add Alert

Cancel Save

Alert Target

Webhook

Alert Trigger

Select the type of alert you want to receive below.

Select an alert trigger

- Select an alert trigger
- Website Visit
- Lead Becomes Hot (Account Centric Scoring)
- Lead Becomes Hot (Contact Centric Scoring)

Alert Status

Off

Part 4

Advanced ABM Attribution

Part 3: Advanced ABM Attribution

Traditional ABM

01 Limited HubSpot-Level Reporting

02 Account-Level Attribution

03 No Pipeline Attribution

Part 3: Advanced ABM Attribution

Traditional ABM



Modern ABM

01 Limited HubSpot-Level Reporting

01 Advanced HubSpot-Level Reporting

02 Account-Level Attribution

02 Contact-Level Attribution

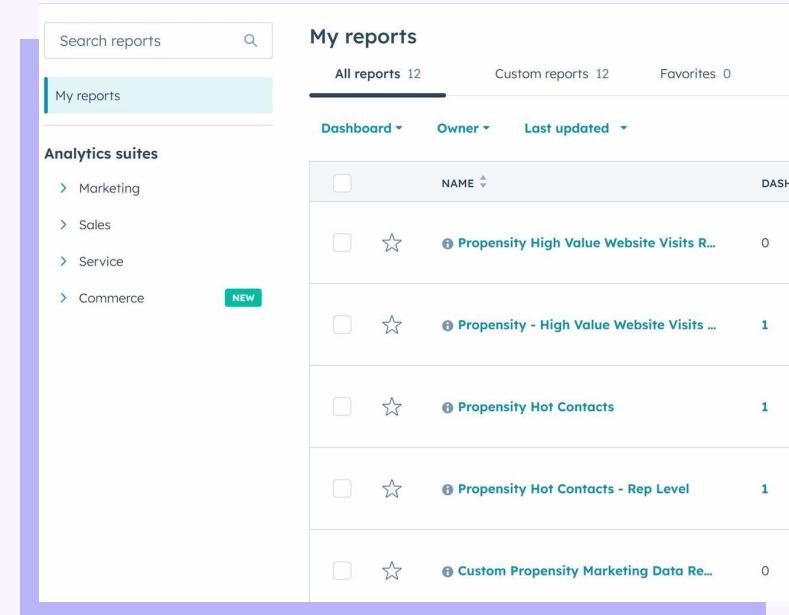
03 No Pipeline Attribution

03 Full Pipeline Attribution Reporting in CRM

Advanced HubSpot-Level Reporting

Common HubSpot Reports:

- Hot leads with ad clicks in the last 30 days
- ABM Influenced Deals YTD
- Contacts who visited the pricing page on website
- High intent accounts
- Most engaged contacts



The screenshot shows the 'My reports' section of the HubSpot interface. At the top, there are tabs for 'All reports' (12), 'Custom reports' (12), and 'Favorites' (0). Below the tabs are filters for 'Dashboard', 'Owner', and 'Last updated'. The main area displays a table of reports with the following data:

| | NAME | DASH |
|--------------------------|--|------|
| <input type="checkbox"/> | Propensity High Value Website Visits R... | 0 |
| <input type="checkbox"/> | Propensity - High Value Website Visits ... | 1 |
| <input type="checkbox"/> | Propensity Hot Contacts | 1 |
| <input type="checkbox"/> | Propensity Hot Contacts - Rep Level | 1 |
| <input type="checkbox"/> | Custom Propensity Marketing Data Re... | 0 |

Customize ABM Reporting in HubSpot

View and filter report

1,770

● (Count) propensity website visits

Page Visited

| Page Visited | (Count) propensity website visits |
|--|-----------------------------------|
| https://www.propensity.com/pricing | 894 |
| https://www.propensity.com/pricing-free-trial | 256 |
| https://www.propensity.com/landers/book-demo | 222 |
| https://www.propensity.com/landers/book-dem... | 147 |
| https://www.propensity.com/video-demo?utm_... | 83 |
| https://www.propensity.com/posts/5-steps-to-... | 31 |
| https://www.propensity.com/landers/book-dem... | 8 |
| https://www.propensity.com/?utm_campaign=... | 7 |
| https://www.propensity.com/video-demo?utm_com... | 6 |
| https://www.propensity.com/pricing?utm_com... | 5 |
| https://www.propensity.com/landers/book-dem... | 4 |
| https://www.propensity.com/video-demo?utm_com... | 3 |
| https://www.propensity.com/landers/book-dem... | 2 |
| https://www.propensity.com/video-demo?utm_com... | 2 |
| https://www.propensity.com/landers/book-dem... | 2 |
| https://www.propensity.com/video-demo?utm_com... | 1 |
| https://www.propensity.com/pricing?utm_sourc... | 1 |
| https://www.propensity.com/video-demo?utm_... | 1 |
| https://www.propensity.com/pricing?utm_term... | 1 |
| https://www.propensity.com/landers/book-dem... | 1 |

0 100 200 300 400 500 600 700 800 900 1K

(Count) propensity website visits

Update existing report Save as new report Customize Cancel

Data is from 2 minutes ago. Refresh

Filters

Include data if it matches:

ALL of the filters below

1 Propensity Website Visits
Visit Date is more than 90 days ago ⓘ

and

2 Propensity Website Visits
Page Visited contains any of pricing, demo, or trial

Save

How did we do? ⓘ

Appears on

This report is

Report measures

These are the

PROPENSITY

Report dimensions

These are the

Inactive filters

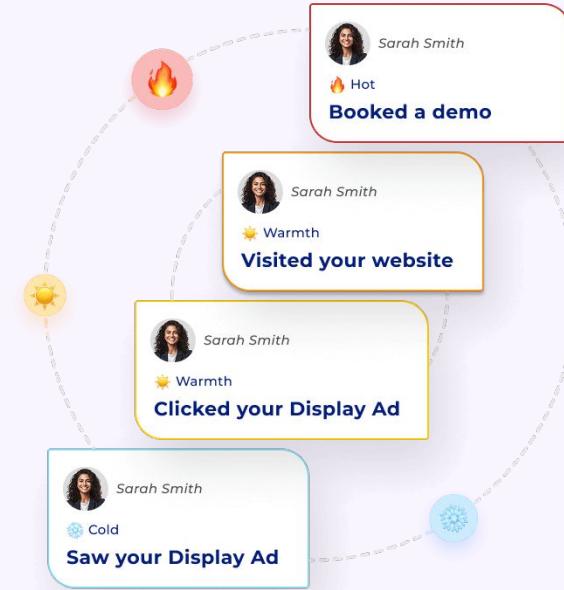
Propensity Website Visits
Browser
click to apply filter

Propensity Website Visits
Device
click to apply filter

Propensity Website Visits
Page Visited
click to apply filter

Contact-Level Attribution

- Tie ad clicks, website visits, and conversions to specific people
- Access minute-by-minute timelines for each contact
- Deliver clean actionable data to your sales team directly in your CRM



Contact-Level Engagement Data

The screenshot displays a software interface for managing contact-level engagement data. The top navigation bar includes links for Overview, Campaigns, Audience, Reporting, Live Chat, and a user profile for 'Proprietary Marketing'. Below the navigation is a secondary header with tabs for Inbound (selected), Cohort 1, Details, Audience, Playbook, Launch, Leads (selected), and Analytics.

The main content area is titled 'Leads' (Updated: 04/30/2025). It shows a summary of lead counts: Cold (6,757), Warm (2,255), Hot (33), and Clairvoyant (4). Below this, a table lists 9,064 Active Leads, including columns for Name, CRM Link, Warmth (Hot), and Warmth Change. The table rows show names like Gavin Burrows, Pamela Vaughan, Rose Harris, Isobel Perez, Hollie Soper, Caroline Oliver, and Sarah Bradberry, each with their respective engagement metrics and activity dates.

A modal window is open on the right, showing a detailed view of a lead for 'The Media Trust' (Marketing Director). The lead is categorized as 'Hot' with a warmth score of 33. The 'Contact Activity History' section lists multiple programmatic ad impressions from 'textnow.co' and 'meetup.com' on dates from April 20 to 27, 2025.

Hot Leads Report in HubSpot

| Propensity Hot Contacts info | | | | | |   |
|---|------------|-----------|-------------------------------|-------------------|---|---|
| Company Name | First Name | Last Name | Email | Propensity Warmth | Propensity Warmth Reason | |
| Truefoundry | Nikunj | Bajaj | nikunj@truefoundry.com | Hot | LinkedIn Impressions: 5 Contacts at this account have seen your ads |   |
| Sprinklr | Nahulan | Buell | nahulan.buell@sprinklr.com | Hot | Ad Impressions: This person saw your ads 8 time(s) - Company |   |
| BetterUp | Shabana | Syed | shabana.syed@betterup.co | Hot | Website Visit: Contacts from this account have visited your website |   |
| Jacobs Engineering Group Inc. | Rochelle | Kimball | rochelle.kimball@jacobs.com | Hot | Website Visit: Contacts from this account have visited your website |   |
| Clarify Capital | Breigh | Mcknight | bmcknight@clari.com | Hot | Ad Impressions: This person saw your ads 5 time(s) - Company |   |
| Rapid7 | Alison | Tinner | alison_tinner@rapid7.com | Hot | Ad Impressions: 4 Contacts at this account have seen your ads |   |
| Abnormal Security | Nhien | Le | nhien.le@abnormalsecurity.com | Hot | Website Visit: Contacts from this account have visited your website |   |

Full Pipeline Attribution Reporting in CRM

With all ABM data in HubSpot...

- See exactly how each campaign, channel, and play influenced pipeline
- Measure performance from first touch to closed-won
- Give marketing the credit they deserve and sales the context they need



Full Pipeline Attribution Reporting in CRM

Propensity Hot Contacts

| COMPANY NAME | FIRST NAME | LAST NAME | EMAIL | PROPSIENCY WARMTH |
|-------------------------|------------|-----------|----------------------------------|-------------------|
| Workiva | Amanda | Lupo | amanda.lupo@workiva.com | Hot |
| Windstream | Jeff | Franzetti | jeffrey.franzetti@windstream.com | Hot |
| Turtle Beach Campground | Kathy | O'regan | kathy.oregan@turtlebeach.com | Hot |
| Couchbase | David | Evans | david.evans@couchbase.com | Hot |
| Alteryx | Javier | Anguiano | javier.anguiano@alteryx.com | Hot |
| Paperless Parts | Sarah | Mcouley | sarah.mcouley@paperlessparts.com | Hot |
| Appviewx | Mahesh | Kumar | mahesh@appviewx.com | Hot |

Propensity Outbound Sales Activities By Account

| COMPANY NAME | (COUNT) ACTIVITIES |
|--|--------------------|
| the judge group | 0 |
| artemis distribution | 0 |
| pyppstream | 0 |
| tdecu | 0 |
| avoma | 0 |
| integrated engineering | 0 |
| congregation emanu el of san francisco | 0 |
| clarivate | 0 |

Propensity ABM Dashboard

ABM Deals

| Deal Stage | Amount (\$) |
|-------------|-------------|
| Opportunity | 120,000.00 |
| Lead | 100,000.00 |
| Prospect | 171,000.00 |
| Total | 391,000.00 |

Propensity Marketing Data By Account

| COMPANY NAME | PROPSIENCY CHANNEL | PROPSIENCY ENGAGEMENT TYPE | PROPSIENCY ENGAGEMENT QUANTITY |
|---------------|-------------------------|----------------------------|--------------------------------|
| 10vpn hosting | facebook | clicks | 140 |
| armanino | programmatic display ad | clicks | 117 |
| teradata | programmatic display ad | clicks | 111 |
| horizon next | linkedin | clicks | 108 |
| bazaarvoice | programmatic | clicks | 97 |
| mckesson | programmatic display ad | clicks | 96 |
| 10vpn hosting | facebook | clicks | 82 |

Propensity - High Value Website Visits (by company)

| COMPANY NAME | (COUNT) PROPENSITY WEBSITE VISITS |
|-----------------------------|-----------------------------------|
| pax | 840 |
| epicor | 221 |
| united cooperative services | 192 |
| thumbtack | 83 |
| infopro learning inc | 78 |
| aila technologies | 77 |
| munidex, inc. | 56 |
| planisware sas | 54 |

Propensity Website Visits By Account

| COMPANY NAME | (COUNT) PROPENSITY WEBSITE VISITS |
|-----------------------------|-----------------------------------|
| pax | 140 |
| epicor | 117 |
| united cooperative services | 111 |
| thumbtack | 108 |
| infopro learning inc | 97 |
| aila technologies | 96 |
| munidex, inc. | 82 |
| planisware sas | 54 |

ABM Coach

AI-Powered Campaigns

ABM Coach

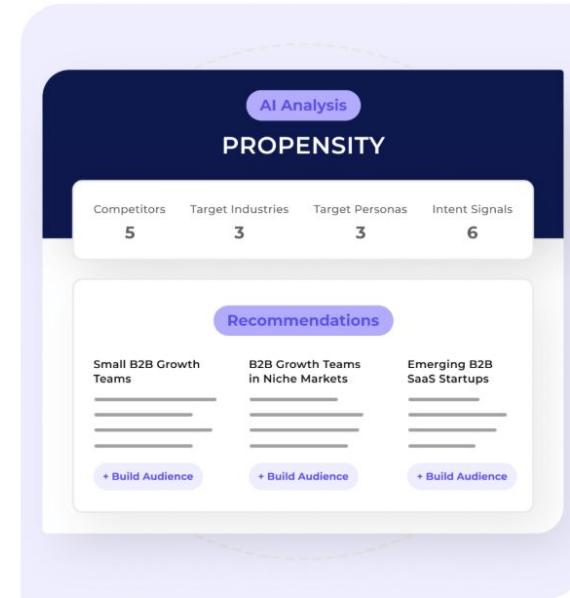
Identify untapped market gaps and target them with the power of AI.

Simply enter your URL and the ABM Coach will uncover your biggest market opportunities and build ABM campaigns with a target audience, tailored to your product or service

yourcompany.com

Search

Powered by Propensity AI



PROPENSITY

Propensity offers an account-based marketing (ABM) platform that enables B2B companies to run omnichannel ABM campaigns with contact-level attribution, helping identify high-intent leads and deliver them directly to sales teams.

| Competitors | Target Industries | Target Personas | Intent Signals |
|-------------|-------------------|-----------------|----------------|
| 5 | 3 | 3 | 7 |

Recommendations

ABM Messaging

B2B Marketing Teams

Enable B2B marketing teams to build trust and guide potential customers through the decision-making process with personalized, omnichannel ABM campaigns.

| | |
|-----------------|------------------|
| Accounts | 389 |
| Contacts | 3,890 |
| Impressions | 500,142 |
| Clicks | 500 (400 to 600) |
| Sales Responses | 116 (38 to 194) |
| Opps Created | 30 (10 to 49) |
| Opps Won | 8 (3 to 13) |
| | |
| Total Cost | \$4,829.14 |

+ Build Audience

B2B Companies in Competitive Markets

Equip B2B companies to identify and engage accounts researching competitors, ensuring inclusion in their evaluation process through targeted ABM strategies.

| | |
|-----------------|------------------|
| Accounts | 280 |
| Contacts | 2,800 |
| Impressions | 360,000 |
| Clicks | 360 (288 to 431) |
| Sales Responses | 84 (28 to 140) |
| Opps Created | 21 (7 to 35) |
| Opps Won | 6 (2 to 9) |
| | |
| Total Cost | \$3,490.00 |

+ Build Audience

Emerging Tech Startups in FinTech

Empower your FinTech startup's growth with precise, contact-level intent insights tailored for emerging tech innovators.

| | |
|-----------------|------------------|
| Accounts | 186 |
| Contacts | 1,860 |
| Impressions | 239,142 |
| Clicks | 239 (191 to 286) |
| Sales Responses | 55 (18 to 93) |
| Opps Created | 14 (5 to 24) |
| Opps Won | 4 (2 to 6) |
| | |
| Total Cost | \$2,335.14 |

+ Build Audience

Q & A

Thank You!

Visit Booth #4 for an ABM analysis and a personalized demo.

ABM Coach

Identify untapped market gaps and target them with the power of AI.

Simply enter your URL and the ABM Coach will uncover your biggest market opportunities and build ABM campaigns with a target audience, tailored to your product or service.

yourcompany.com

Search

Powered by Propensity AI

AI Analysis

COMPETITORS

5

TARGET INDUSTRIES

3

TARGET PERSONAS

3

RECOMMENDATIONS

Small B2B Growth Teams

B2B Growth Teams in Niche Markets

+ Build Audience

+ Build Audience

PROPSIENCY

Propensity offers an account-based marketing (ABM) platform that enables B2B growth teams to run omnichannel ABM campaigns with contact-level attribution, providing visibility into individual interactions and delivering high-intent leads directly to sales.

Competitors 5

Target Industries 3

Target Personas 3

Intent Signals 7

ABM Messaging

Small B2B Growth Teams

Enable small B2B growth teams to implement effective ABM strategies with contact-level attribution, providing clear visibility into individual interactions and delivering high-intent leads directly to sales.

| Accounts | 178 |
|-----------------|-----------------|
| Contacts | 1,780 |
| Impressions | 228,857 |
| Clicks | 228 (83 to 274) |
| Sales Responses | 53 (7 to 89) |
| Opps Created | 14 (5 to 23) |
| Opps Won | 4 (2 to 6) |
| Total Cost | \$2,236.86 |

B2B Growth Teams in Niche Industries

Empower B2B growth teams in niche industries to execute targeted ABM campaigns with contact-level attribution, ensuring precise engagement with high-intent leads and alignment with industry-specific goals.

| Accounts | 1 |
|-----------------|------------|
| Contacts | 20 |
| Impressions | 2,571 |
| Clicks | 2 (2 to 3) |
| Sales Responses | 0 (0 to 1) |
| Opps Created | 1 (1 to 1) |
| Opps Won | 1 (1 to 1) |
| Total Cost | \$404.00 |

Lean B2B Growth Teams in Emerging Tech

Empower your lean team to drive growth with contact-level intent insights and omnichannel ABM campaigns tailored for emerging tech innovators.

| Accounts | 250 |
|-----------------|------------------|
| Contacts | 2,500 |
| Impressions | 321,428 |
| Clicks | 321 (257 to 385) |
| Sales Responses | 75 (25 to 125) |
| Opps Created | 19 (7 to 32) |
| Opps Won | 5 (2 to 8) |
| Total Cost | \$3,121.43 |

IN 25

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to provide your feedback.
Thank you!