ABM Planning Workbook:

Account Identification, Insights and Touchpoints

How to use this worksheet

Large (one-to-one) Program

Identifying fewer accounts for deeper engagement often requires less “hard” data for account selection. Instead, you’ll need more participation from stakeholders to identify accounts that align with business and ABM priorities.

1. Complete section 1.
2. Review sections 2 and 3 to identify meaningful inputs and prepare for the collaborative process to determine target accounts.

Named / Industry (one-to-many) Programs

You’ll want to tailor your account identification plan to the scale of your program. Collaboration with sales is critical, but you can do a lot of preparation to gather meaningful data to ensure an efficient process.

1. Complete section 1.
2. Review sections 2 and 3 to plan for data collection and research for account identification.

Account Identification Readiness Assessment

Section 1: Foundational Readiness

Are Sales and Marketing aligned on the scope and goals of the ABM program?

☐ Yes ☐ No

Do we have an established budget allocated to support ABM?

☐ Yes ☐ No

Have we allocated people and time to support ABM?

☐ Yes ☐ No

Which type of ABM are we doing?

☐ Large:
Very few accounts, one-to-one marketing

☐ Named:
Large number of defined accounts, one-to-many marketing (can be broken into clusters to narrow to a one-to-few approach)

☐ Industry:
Large number of defined accounts aligned to a specific industry, one-to-many marketing (can be broken into clusters to narrow to a one-to-few approach

☐ Customer Lifecycle:
Customer accounts that receive differentiated outreach

☐ Mix:

____

Section 2: Systems and Data Readiness

Do we have an account view of leads and opportunities in our CRM or SFA system?

☐ Yes ☐ No

If using marketing automation for a one-to-many program (named / industry approach), insights must be stored as data fields to be leveraged efficiently.

Do we have a data management plan for additional account insights, such as industry, persona or pain points?

☐ Yes ☐ No

Is our marketing automation synced with our CRM or SFA to make use of custom data fields?

☐ Yes ☐ No

Where will we gather the information needed for historical and business opportunity analysis?

Historical Data Analysis				
	Data			Insight
	Accessible in our CRM or SFA	Accessible in another system *List system*	Accessible in historical reports *List source*	Gather input from internal meetings and inverviews *List participants*
Example	☑			*Met with Ed W. and Shirley S.*
Which types of accounts have we sold most effectively in the past?	☐			
Which types of accounts have been most profitable over time?	☐			
Which types of accounts represent the largest share of revenue?	☐			
Business Opportunity Analysis				
Which account characteristics are the best fit for our product / service (play to our strengths)?	☐			
Which industries or sub-industries do we have an advantage in or work with today?	☐			
Which industries offer the biggest future growth opportunity for our product / service?	☐			
Are there any firmographics or profile characteristics that would rule out an account?	☐			

Section 3: Profile Identification

Large (on-to-one) Program

- If you are only targeting a small list of accounts, you may not need to identify an Ideal Customer Profile (ICP).
- If your list of accounts is too big, gathering some of the information below may aid prioritization and collaboration with the sales team.

Named / Industry (one-to-many) Program

- Defining your Ideal Customer Profile (ICP) can help you identify critical characteristics to target in ABM.
- Your ICP can help you identify ideal customers or prospects in your existing database that match the profile, or prioritize the type of new accounts you want to target.

What information to identify an ICP do we already have, and where is it located? What information will we need to acquire?

Firmographics						
	Data				Insight	
	Accessible in our CRM or SFA	Accessible in another system *List system*	Accessible in historical reports *List source*	Need to acquire this data *append, telemarketing, e-survey, progressive profiling, etc.*	Gather input from internal meetings and inverviews *List participants*	Not important *Do not include in ICP*
Industry (NAICS, SIC or Description)	☐					☐
Annual Sales Volume	☐					☐
Total # of Employees	☐					☐
Geographic Location / Region	☐					☐

Custom Profile Characteristics				
e.g. Technographics	☐			
	☐			
	☐			
	☐			

Account Insights Readiness Assessment

ABM Program Type: ☐ Large ☐ Named ☐ Industry ☐ Customer Lifecycle

ABM Program Scale:

☐ One-to-one
Deep research to deliver fully customized experience

☐ One-to-few
Key selling points (for cluster/account) to deliver tailored experience with personalization

☐ One-to-many
Industry or segment insights to deliver relevant experience with basic personalization

Insight Source Planning

	Importance *1=Low, 5=High*	Accessible in tech stack *CRM, SFA, MAP, etc. list system*	Accessible in historical reports *list system*	Gather input from internal meetings and interviews *list participants*	Gather through research *list owner*	Acquire this data *append, telemarketing, third-party resource, etc.*	Gather over time *progressive forms, sales conversations, etc.*	Not important or applicable *exclude from insights*
Example	1 2 3 4 5			*Meet with SDRs*	*Emily P*			☐
Account Insights								
SWOT Analysis	1 2 3 4 5							☐
Business Strategy and Priorities	1 2 3 4 5							☐
Competitors	1 2 3 4 5							☐
Buying Centers	1 2 3 4 5							☐
Org Chart	1 2 3 4 5							☐
Contract Cycle	1 2 3 4 5							☐
Technographics	1 2 3 4 5							☐
Previous Proposals	1 2 3 4 5							☐

	Importance *1=Low, 5=High*	Accessible in tech stack *CRM, SFA, MAP, etc. list system*	Accessible in historical reports *list system*	Gather input from internal meetings and interviews *list participants*	Gather through research *list owner*	Acquire this data *append, telemarketing, third-party resource, etc.*	Gather over time *progressive forms, sales conversations, etc.*	Not important or applicable *exclude from insights*
Account Insights ***(continued)***								
Relationships with Key Contacts	1 2 3 4 5							☐
Linkedin Connections	1 2 3 4 5							☐
Persona / Contact Insights ***(persona-level for one-to-many, contact-level for one-to-one)***								
Title / Role	1 2 3 4 5							☐
Tenure	1 2 3 4 5							☐
Purchase Authority	1 2 3 4 5							☐
Media and Web Habits	1 2 3 4 5							☐
Priorities	1 2 3 4 5							☐
Pain Points	1 2 3 4 5							☐
Buyer's Journey	1 2 3 4 5							☐
Perceptions of Our Brand	1 2 3 4 5							☐
Perceptions of Competitors' Brands	1 2 3 4 5							☐
Engagement History	1 2 3 4 5							☐
Skills and Interests	1 2 3 4 5							☐

	Importance *1=Low, 5=High*	Accessible in tech stack *CRM, SFA, MAP, etc. list system*	Accessible in historical reports *list system*	Gather input from internal meetings and interviews *list participants*	Gather through research *list owner*	Acquire this data *append, telemarketing, third-party resource, etc.*	Gather over time *progressive forms, sales conversations, etc.*	Not important or applicable *exclude from insights*
Current Customer Insights								
Purchased Products / Services	1 2 3 4 5							☐
Engaged Buying Centers	1 2 3 4 5							☐
Share of Wallet	1 2 3 4 5							☐
Renewal Date	1 2 3 4 5							☐
Custom:	1 2 3 4 5							☐
Market Insights								
News and Trends	1 2 3 4 5							☐
Growth Drivers	1 2 3 4 5							☐
Growth Inhibitors	1 2 3 4 5							☐
M&A Activity	1 2 3 4 5							☐

Touchpoint Planning and Personalization

Account, Industry or Segment:	Persona / Role:	Product / Solution:

Stage of Buyer Journey: ☐ Education ☐ Solution ☐ Selection

Touchpoint: *(content, event, etc.)*			Touchpoint: *(content, event, etc.)*			Touchpoint: *(content, event, etc.)*		
Existing?	Creation Date?	Needs updates?	Existing?	Creation Date?	Needs updates?	Existing?	Creation Date?	Needs updates?
Other:			Other:			Other:		
Personalization and Customization			**Personalization and Customization**			**Personalization and Customization**		
Industry or Account Level *(images, stats or examples)*			Industry or Account Level *(images, stats or examples)*			Industry or Account Level *(images, stats or examples)*		
Persona Level *(Title personalization, empathy copy or other)*			Persona Level *(Title personalization, empathy copy or other)*			Persona Level *(Title personalization, empathy copy or other)*		
Company or Contact Level *(Fully customized)*			Company or Contact Level *(Fully customized)*			Company or Contact Level *(Fully customized)*		

B2B Like It Oughta Be.

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