## **Account Insights Readiness Assessment**

ABM Program Type:		] Large □	Named 🛛	Industry 🛛	Customer Life	cycle			
5		One-to-one Deep research to deliver		□ One-to-few Key selling points (for		One-to-many Industry or segment insights			
fully c		ly customized experience		cluster/account) to deliver tailored experience with personalization		to deliver relevant experience with basic personalization			
Insight Source Pla	anning								
	Importance 1=Low, 5=High	Accessible in tech stack CRM, SFA, MAP, etc. list system	Accessible in historical reports <sup>list system</sup>	Gather input from internal meetings and interviews <i>list participants</i>	Gather through research <sup>list owner</sup>	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	123495			Meet with SDRs	Emily P				
Account Insights									
SWOT Analysis	12345								
Business Strategy and Priorities	12345								
Competitors	1 2 3 4 5								
Buying Centers	1 2 3 4 5								
Org Chart	1 2 3 4 5								
Contract Cycle	12345								
Technographics	12345								
Previous Proposals	1 2 3 4 5								

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Account Insights (continued)									
Relationships with Key Contacts	12345								
Linkedin Connections	12345								
Persona / Contact Insights (persona-level for one-to-many, contact-level for one-to-one)									
Title/Role	12345								
Tenure	12345								
Purchase Authority	12345								
Media and Web Habits	12345								
Priorities	12345								
Pain Points	12345								
Buyer's Journey	12345								
Perceptions of Our Brand	12345								
Perceptions of Competitors' Brands	12345								
Engagement History	12345								
Skills and Interests	12345								

	Importance 1=Low, 5=High	Accessible in tech stack CRM, SFA, MAP, etc. list system	Accessible in historical reports <i>list system</i>	Gather input from internal meetings and interviews <i>list participants</i>	Gather through research <sup>list owner</sup>	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	12345								
Engaged Buying Centers	12345								
Share of Wallet	12345								
Renewal Date	12345								
Custom:	12345								
Market Insights									
News and Trends	1 2 3 4 5								
Growth Drivers	12345								
Growth Inhibitors	1 2 3 4 5								
M&A Activity	1 2 3 4 5								