ABM Pilot Design Framework

# Goal Setting



|  |  |
| --- | --- |
| **Specific** | (why is this important now) |
| **Measurable** | (how will you know if this was successful?) |
| **Attainable and**  **Realistic** | (be realistic and can you get buy-in to this?) |
| **Timebound** | 90-days |

|  |  |
| --- | --- |
| External Barriers | Internal Barriers |

|  |  |
| --- | --- |
| Insights |  |
|  |  |

# Best Fit Account Research

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| --- |
| **What do you wish you knew that would help you determine best fit accounts and targets?**  **[Complete this]** |
| **What additional data and insights would help you narrow down your best fit accounts?**  **[Highlight]**  **­**   * Firmographic   + Geography   + Employees   + Revenue   + Market Segment   + Technology * Additional characteristics   + Organization size is a good fit   + In the right geography   + Revenue potential is high   + Sales cycles are shorter than average   + Aligned with company objectives   + Financial viability   + Ability to sell to them   + Relationships   + Competitors   + Stability   + Third-party relationships * Sales History   + Lead   + Lapsed Opp   + Live Opp   + Customer   + Loyal Customer   + Lapsed Customer * Positioning   + Competitor’s Customer   + Frequent web site visitors   + Handraiser * Intent   + Intent to buy   + Interest in category   + Actively researching   + Competitor’s customer   + Persona match |
| **What data and insights would help you determine who is in-market?**  **[Highlight]**   * Sales History   + Lead   + Lapsed Opp   + Live Opp   + Customer   + Loyal Customer   + Lapsed Customer * Positioning   + Competitor’s Customer   + Frequent web site visitors   + Handraiser * Intent   + Intent to buy   + Interest in category   + Actively researching   + Competitor’s customer   + Persona match |

# 90-day ABM Pilot Design

**Complete highlighted elements now and the rest later**

|  |
| --- |
| Goal (from Exercise #1) |
| Who will be involved in this project?  Sales:  Marketing:  Other:  Executive sponsor: |
| Which flavor ABM will you focus on?  1:1  1:Few  1Many |
| How many accounts do you want to engage in this experiment? |
| What data and insights are critical for you to gain for this pilot to be successful? |
| Which persona will you target? What are you trying to achieve with this persona? |
| What assets do you have to hand to achieve this?  Content:  Data:  Events:  Is there anything new you know you will need? |
| What technology do you have now that you can implement this with?  Web analytics? CRM? Email analytics?  What else? |
| Is there anything else that is a must have that will require additional budget?  Why is this critical? |
| How will you measure success? |
| What budget is needed? |