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?1:11:Few1Many |
| 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? |