

Foundational Questions and Checklists to Help You on Your ABM Journey

Total Customer Growth
Planning Template

### Total Customer Growth Planning Framework

This series of questions is designed to help you self-assess your readiness to start and the progress on your Total Customer Growth Journey. This will help you fill the gaps and pinpoint where improvements are needed. The book is designed to help you answer these questions and guide you on your journey.

This is organized into two sections. Section 1 is a self-assessment tool that asks foundational questions to help you determine your state of readiness to start this ABM-based journey. Section 2 are check-lists for each stage of your journey. In Chapter 14 we introduce the idea of Think/Crawl/Walk/Run. Below are checklists for each stage.

### **Section 1 – Getting Started**

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| **Strategic Foundations** |
| **Goals** |
| What are your ABM goals? |  |
| How will actions be measured? |  |
| What will it take to attain them? |  |
| **Ideal Customer Profile (ICP)** |
| How is your ICP defined? |  |
| Do you have a Target Account List (TAL)? |  |
| Is there a best-fit customer definition |  |
| Is the buyer collective defined? |  |
| **Buyer Journey** |
| Do you have personas for champions? |  |
| How has their buyer journey been defined? |  |
| What is the competitive landscape? |  |
| What are the compelling events that drive a purchase? |  |

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| **Planning** |
| Who is executive sponsor? |  |
| Who from marketing will be involved? |  |
| Who from sales? |  |
| Will SDRs be involved? |  |
| Who will run this? |  |
| Who will be on steering committee? |  |
| Who is executive sponsor? |  |
| **Pilot or Project Design** |
| What can be done in 90-days without anything new? |  |
| What simple new addition is possible? |  |
| Measures of success? |  |

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| **Execution** |
| What content do you have to address the buyer journey? |  |
| What are the gaps? |  |
| What are your owned channels? |  |
| What are you earned channels? |  |
| What paid tactics do you use? |  |
| What paid tactics do you want to try? |  |
| What is your CRM? Marketing Automation System? |  |
| What else is in your tech stack? |  |
| Have you evaluated an ABM platform? |  |
| Do you have good account and contact data? |  |
| Do you have intent data? |  |
| Where are the gaps? |  |

### **Section 1 – Think/Crawl/Walk/Run Checklist**

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| **Think** |  |
| Specific measurable 90-day goals defined |  |
| Stakeholders: |  |
| Marketing |  |
| Sales |  |
| SDR/BDRs |  |
| Executive Sponsor |  |
| Well-defined ICP |  |
| Best-fit customer defined |  |
| Target Account List requirements defined |  |
| Buyer Collective is defined |  |
| Champion Personas are created |  |
| Buyer journeys are detailed |  |
| Engagement Plan: |  |
| Content Plan is created |  |
| Defined use plan for owned channels |  |
| Defined use plan for paid channels |  |
| Defined use plan for earned channels |  |
| Measurement KPIs determined |  |
| Tactical plan created |  |
| Clear priorities for 90-days |  |
| Budget is secured |  |

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| **Crawl** |  |
| Specific measurable 90-day goals defined |  |
| Stakeholders: |  |
| Marketing |  |
| Sales |  |
| SDR/BDRs |  |
| Executive Sponsor |  |
| Target Account List is built |  |
| Intent Data (at least one of the following): |  |
| First-party |  |
| Third-party |  |
| Content assets are in place or in development |  |
| Improvements to owned channels are in process |  |
| Paid channel plan is ready to execute |  |
| Advertising assets are in place or in development |  |
| Social media assets in place or in development |  |
| Email assets in place or in development |  |
| Earned channel in place or in development |  |
| Measurement dashboard in place |  |
| 90-day plan is approved |  |
| Meeting routines booked |  |
| Updates with Executive stakeholder booked |  |

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| **Walk** |  |
| Specific measurable 12-month goals defined |  |
| Stakeholders: |  |
| Marketing |  |
| Sales |  |
| SDR/BDRs |  |
| Executive Sponsor |  |
| Annual Plan |  |
| Operational and Training Plan for key staff |  |
| Customer acquisition plan |  |
| Existing Customer Growth Pilot plan |  |
| Data |  |
| Target Account List is complete |  |
| First-party intent data is measured |  |
| Second-party intent data is monitored |  |
| Third-party intent data is available |  |
| Technology |  |
| Plan to evaluate ABM Platforms |  |
| Marketing automation in use for ABM |  |
| CRM in use for ABM |  |
| Engagement Plan |  |
| Improvement plan for owned channels |  |
| Improvement plan for paid channels |  |
| Test and learn plan for paid channels |  |
| Improvement plan for earned channels |  |
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| **Run** |  |
| New Customer Acquisition |  |
| ABM is integral to sales and marketing |  |
| C-Suite is bought in |  |
| Sales and Marketing are aligned |  |
| All sales and marketing trained in ABM |  |
| Dedicated ABM resource in place |  |
| Using Agile Marketing Methodology |  |
| Existing Customer Growth |  |
| ABM part of customer growth strategy |  |
| Gathering customer feedback regularly |  |
| Know who advocates and detractors are |  |
| Retention/Growth plan in place |  |
| Have identified customer champions |  |
| Implementing Champion Customer Plan |  |
| Mitigating issues with detractors |  |
| Technology |  |
| ABM Platform implemented |  |
| ABM Platform used effectively |  |
| ABM platform integrated with CRM |  |
| SDRs and Sales view ABM data in CRM |  |
| Integrating other tools w. ABM platform |  |
| Measuring Sales KPIs |  |
| Average deal size |  |
| Sales velocity |  |
| Sales cycles |  |

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