

# ABM READINESS CHECKLIST

## I Prerequisites for ABM

- Active use of a linked CRM platform (Salesforce) and Marketing Automation Platform (MAP).
- Competency in multi-touch demand generation and nurturing campaigns.
- A target market that is composed of a manageable number of “known entities.” For example, all U.S. insurance companies or all investment banks.
- An effective set of personas, along with content and messages directed at each.
- Documented customer journey map with buying-center participants and roles.
- Use of inbound and outbound marketing and sales tactics, often in concert.
- Active, comprehensive record-keeping in the CRM as the system of record.
- Interoperability between core systems and tools used by Marketing & Sales.
- Regulatory compliance across all outbound communications.
- Senior executive commitment and sponsorship across all Marketing and Sales functions.

## I Actions Before Embarking on ABM

- Actively work (top-down) to build strong alignment between Marketing, Sales Development and Sales groups.
- Consider investing in marketing expertise in demand generation and lead management.
- Review and improve lead management processes, definitions and hand-offs for leads and target clients. This includes new lead-to-existing-account matching.
- Upgrade key-account data quality in SFDC, including consolidated activity histories from various databased and appended account data.
- Clearly identify your Ideal Customer Profile (ICP) and use it to identify your Key Accounts, segmenting your Target Account List by potential value.
- Invite Mktg/Sales leaders to participate in an ABM Council tasked with implementing a pilot.
- Set schedule and expectations with both inside and field Sales teams, leaving the hype for later.
- Map a foundational programmatic buying-center pilot campaign with KPIs.
- Develop a project plan for implementing programmatic ABM (one-to-many ABM for accounts that are worth some customization.)
- Get agreement with Sales and Marketing management on the goals of the ABM initiative and pilot program.

## | Actions That Require Attention While Launching ABM

- Identify key Buying Center Persona (BCP) information needs at each buying journey stage.
- Map content, messages to BCP campaigns and touchpoints.
- Design and develop account-specific touchpoints and content for the pilot campaign.
- Orchestrate cross-functional multi-channel plays – Marketing campaigns, SDR communications, Sales actions.
- Build campaigns to nurture BCPs along their journeys.
- Implement Account Engagement Scoring with precise stage definitions.
- Define ABM KPIs and agree on measures of success.
- Track and measure account progress in your MAP and Salesforce – circulate dashboards and celebrate successes.
- Use pilot learnings to enhance and improve Programmatic ABM campaigns, touchpoints and plays.
- Work with the Advisory Council to project plan Scale ABM (one-to-few ABM for high-value accounts grouped into micro-segments.)

## | Actions That Require Attention After Launching ABM

- Implement target-account alerts and reports to SDRs and Sales.
- Develop scale account entitlements (amount of time, money and resources to be dedicated to each).
- Set up an account planning process that will let you add new targets and elements with speed at scale.
- Develop a research/thought leadership program that can be adapted for BCPs needs.
- Set up an efficient process for customizing and delivering content.
- Personalize digital channels for key accounts including the website experience.
- Create a one-to-one C-level campaign for a handful of top targets.
- Get sophisticated about account analytics – account penetration, coverage, awareness, engagement, attribution, journey analytics, pipeline velocity, win/loss rates, churn, cross-sell rates, retention, ARR, MROI.
- Consider investing in ABM-focused tools for predictive analytics, attribution modeling, advertising automation, etc.
- Continuous optimization with The Pedowitz Group.



### About the author:

**Lorena Harris** is a Senior Strategist with The Pedowitz Group, joining after VP-level positions at several Fortune 500 companies. She specializes in designing roadmaps for change across marketing operations, programs and campaigns. Helping enterprises benefit from Account-based Marketing is her current passion.