

ABM Planning Checklist

Have you taken the right steps to make sure your ABM initiative achieves the results you expect?

1 Goals & Objectives

ABM is not a one-size-fits-all strategy. Understanding what specific results you hope to achieve with ABM is a critical first step to ensuring you get the most from your investment.

Define success

- ✓ What are your specific, quantifiable goals for ABM? What would you like to see ABM achieve?
- ✓ What are the KPIs by which you'll measure success? (Remember, ABM success isn't measured in leads or MQLs but rather by such criteria as Marketing Qualified Accounts, Target Account Awareness & Engagement, Pipeline from Target Accounts, etc.)

2 Target Accounts

It's not enough that target accounts are selected based on a wish list from the sales team. To be most successful, a target account list should represent those organizations with the greatest revenue potential but also the greatest propensity to buy.

- ✓ What criteria were used to create a target account list? To what extent does that list represent accounts with not only revenue potential but also a likelihood to want/need your solution?
- ✓ To what extent do you already have complete contact information (name, title, phone, email) for key buying personas within each account?

list is critical

3 Internal Buy-In

ABM is most successful when it's a collaborative effort between both marketing and sales. Both teams should be committed to the strategy, and active participants in its planning and execution.

- ✓ Do the executive and sales teams support the ABM initiative? Are there any concerns that should be taken into consideration when planning the program?

4 Audience Profile

Understanding your target audience is even more critical for ABM vs. broad-based demand generation. That's because, to drive engagement, messages, tactics, and content need to be both personalized and highly relevant.

- ✓ Who are the buying groups at your target accounts? Define the roles that form that buying group: influencers, stakeholders, and decision-makers.
- ✓ Have you created a "message matrix" or otherwise clearly defined pain points and value propositions for each of the key buying personas, verticals, or other account differentiators?

1. influencers
2. stakeholders
3. decision-makers

5 Use Cases

ABM is about more than simply penetrating net new target accounts, and can be applied to a myriad of sales and marketing objectives. Defining and then prioritizing these use cases is a first step towards designing ABM "plays" to address them.

- ✓ Describe all possible use cases or scenarios where ABM might play a role, even if you don't consider them practical or a priority. For example: competitive replacement, customer onboarding, trial conversion, customer renewal.

where else is ABM a fit?

6 Content

Personalized, relevant content is a key ingredient for ABM success.

- ✓ Have you inventoried all possible content (white papers, ebooks, webinars, video) that might be usable for ABM?
- ✓ Have you mapped that content against personas, verticals, and any other account differentiators in order to identify where content may need to be versioned or repurposed, or new content created?

identify content gaps

7 Technologies

You don't necessarily need technology to execute ABM. But the right technology can make ABM more effective or easier to implement at scale.

- ✓ What technologies do you have in place today that might be leveraged when building an ABM strategy? (Ex: marketing automation, predictive analytics, account-based analytics, lead-to-account routing)

do we have the tech we need?



Spear Marketing Group is a full-service B2B demand generation agency that provides a comprehensive suite of ABM-related services, leveraging the same knowledge and expertise we've honed from years of experience in developing successful demand generation programs for B2B clients. For more information on our ABM practice, [visit the Spear website](#), or contact us for a free consultation.

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