

ABM Program Toolkit



All you need to get started
with your **ABM Program in
2024**

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Introduction

Account-based marketing (ABM) is one of the most sought-after B2B approaches of the current time, owing to its amazing results.

However, organizations find it a bit challenging to get started with ABM. This ABM Toolkit holds the right templates to kickstart your ABM Program!

But first, What is ABM?

Account-based Marketing,

or **ABM** is a go-to-market strategy that coordinates highly valuable, personalized experiences across all functions that impact the customer (e.g. marketing, sales development, sales, and customer success) to drive engagement at a targeted set of new or existing accounts.





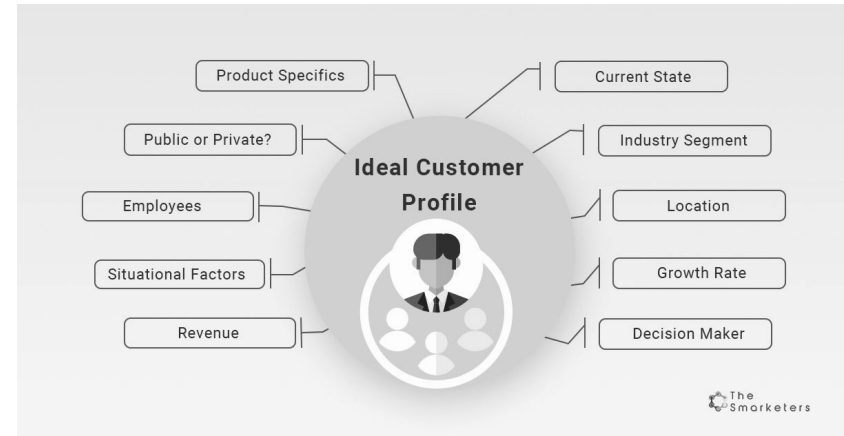
ABM Templates

Ideal Customer Profile

How to Use This:

Leverage this template to dig deep into your existing customers and target segments and define an ideal customer profile. The ICP can then be used to define your target account lists and further create ABM programs.

[Access ICP Template](#)



Target Account List

How to Use This:

Use this template to build your target list be it any type of campaign you will be running (1:1, 1:few, 1:Many) along with basic firmographic details and their tech stack.

[Access Account List Template](#)

Stakeholder Mapping

How to Use This:

Map all your target prospects within an account and capture their contact information and other details.

[Access Stakeholder Mapping Template](#)

Account Research

How to Use This:

This template will help you plug in the data for the target account on your list. Ideally recommended for 1:1 ABM campaigns

Ideally recommended for 1:1 ABM campaigns

[Access the template here](#)

Account Overview

Gather information about the company's line of business, geographic presence, and revenue. Do a SWOT analysis if, required. Check out the market landscape into which your account falls.

Tech Stack

Look for information about technologies like ERP, CRM, Finance, HR applications, etc., the company is currently using. (Add as per the relevancy to your business.)

Trigger Events /Scoops/ Recent Developments

Any signals that lead to an opportunity. For eg: change in CIO/CFO, entering a new market, etc.

CXO's Reflections / Verbatims

Collate conversations on transformation, disruption, innovation, tech implementations, focus areas, future strategy, etc., based on your target audience, business, and industry.

IT Vendors

Look for strategic alliances and partnerships, deals with tech vendors, and what work you're doing with them.

Stakeholder Mapping

Find out who are the decision-makers and influencers in a particular target account for your value proposition.

Analysis & Inferences

With the above, you can draw inferences to understand the target account's pain points, focus areas, and intent.

Content Audit

How to Use This:

This template will become a go-to document to organize all your existing content. It's meant to map all the content across the TOFU, MOFU, and BOFU stages along with gated and non-gated content. It covers core questions like which marketing asset targets which persona, industries, and what pain points to offer a comprehensive overview.

Accordingly, you can plan touchpoints and what is missing from your content strategy for ABM campaigns. You can update it every month as and when new content is published or is ready to be used for campaigns.



[Access Content Audit Template](#)

Buyer Persona Research & Analysis

How to Use This:

This template will help you define your ideal customer profile (ICP) or the buyer persona and how you can communicate with the different sets of personas on your target list. It will also help you understand what the individuals within those roles desire, fear, and care about and which questions, opportunities, and success factors to utilize.

You can gather the data through research, surveys, interviews, inputs from sales teams, etc. Once you have the information you can craft the message for your different target personas accordingly.

[Access Buyer Persona Template](#)



Buyer Persona Research & Analysis

How to Use This:

This template will help you collate information about your target industry and a cluster of accounts belonging to a particular industry sector. It also gives you content strategy takeaways. With this, you can plan your content for campaigns.

Ideally recommended for 1: Few, 1:Many ABM campaigns.

[Access Buyer Persona Template](#)

Industry Sub segments
Market Size
Other Facts & Figures
Top Players
Industry Pain Points
Key trends & development shaping XYZ Industry
Regional Trends
XYZ Industry Transformation (Evolving Business Models)
Overview of sector digital environment, adoption trends, investment trends & opportunities. List down some Use Cases, examples etc.
Areas where digital developments will drive value for XYZ sector
What are the factors that limit the industry to adopt certain technology/solution you offer?
What benefits come in with the adoption of certain technology? (Cost-savings, efficiency, productivity by XX% - look for average industry numbers if available)
Industry CXO's Speak across region
Analyst Comments
Best Practices that industry is adopting to take into account to increase their chance of success in a particular technology implementation
What are the business needs of clients and how companies are responding (opportunity areas)?
Key Takeaways

Messaging Framework

How to Use This:

Use this template for making up your core messaging document for your target audience to tell a coherent story. You must define the vitals, including your elevator pitch, brand narrative, positioning statement, etc., here.

[Messaging Framework Template](#)

Campaign Brief

How to Use This:

Make use of this format for creating a list of campaign themes or scenarios you intend to run the campaigns on. It can differ based on the type of ABM program, audience, and duration, and accordingly, map it to your use cases. Here, you can also mention possible subject lines to run A/B tests for different scenarios.

[Campaign Brief Template](#)

Solution Mapping

How to Use This:

Organize your business use cases for a specific industry, audience, problem statement, how your solutions help, and its USPs. List down the reasons why prospects should consider your company over your competitors and any existing content assets you have already in place for the same.

[Solution Mapping Template](#)

Account-based Advertising

How to Use This:

Keep a track of your ad copies, audience creatives, budgets, duration, advertising channels you are leveraging, customer journey, and optimization plan while running ads via multi-channel platforms

[Account-based Advertising Template](#)

Scoring Matrix

How to Use This:

Use this template to give scores to leads and arrive at account scores accordingly. Feel free to add channels and metrics you want to measure and allot scores to. This is just a sample of possible metrics and channels but it can vary from company to company.

[Scoring Matrix Template](#)

Campaign Reporting

How to Use This:

This will be a comprehensive sheet to track engagement with leads and accounts across various channels. Dates, assets being sent, and actions taken by the prospect on the assets across channels can be tracked here. Feel free to modify it as per your campaign plan and strategy.

[Reporting Template](#)

Marketing and Sales SLA

How to Use This:

To align marketing and sales teams, leverage this SLA and set up SOPs between the two functions. This will allow smooth transitions between sales and marketing when reaching out to the prospect.

[Marketing and Sales SLA Template](#)



ABM is beyond just tools

Content

Relevant content for the right people

Personalization

Focused targeting with in-depth personalization

Insights

Orchestrating based on insights and data

Measurement

Measuring and Optimizing at every step

We do this day in and day out.

Holler at us!

**Want help to refine or
kickstart your ABM Program?**

Reach out to us:

info@thesmarketers.com

www.thesmarketers.com

