

ABM Program Toolkit



All you need to get started
with your **ABM Program**
in 2025

Here's what you'll find in this **Toolkit**:

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Introduction

Account-based marketing (ABM) is one of the most sought-after B2B approaches at present, 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.





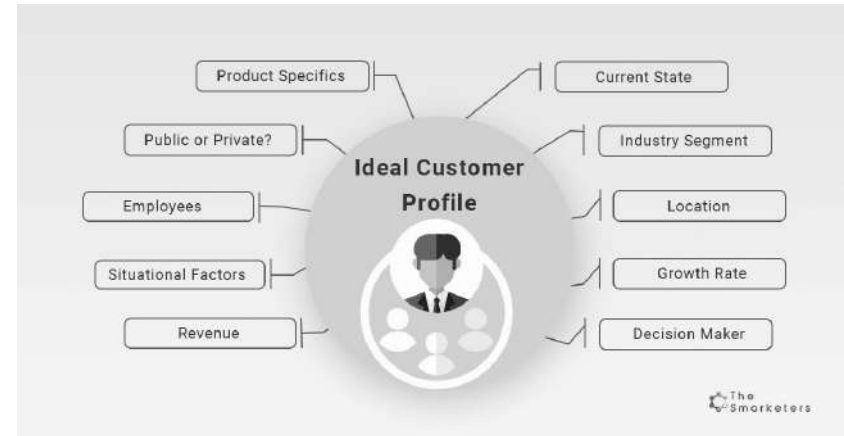
ABM Templates

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.

[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 the technologies the company is currently using, such as ERP, CRM, Finance, HR applications, etc. (Add as per the relevancy to your business.)

Trigger Events /Scoops/ Recent Developments

Any signals that lead to an opportunity. For example, there may be a 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 the decision-makers and influencers are 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 helps define your Ideal Customer Profile (ICP) or buyer personas and craft tailored messages for different target personas. It provides insights into what these roles desire, fears, and prioritize, as well as the questions, opportunities, and success factors to leverage.

Gather data through research, surveys, interviews, or sales team inputs. Use this information to understand your target industry and account clusters within a specific sector. The template also includes content strategy takeaways to help plan campaigns effectively.

Ideal for 1:Few and 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 to make up your core messaging document for your target audience and 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 to create a list of campaign themes or scenarios on which you intend to run the campaigns. 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 for running 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 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](#)

MarTech Integrations

How to Use This:

This template helps you map out and streamline your marketing technology stack for effective ABM execution. Use it to identify the tools you need, from CRM and marketing automation to analytics and advertising platforms, and outline how they integrate for seamless data flow. Track integrations, workflows, and alignment across your tech stack to ensure efficient collaboration between teams. This template provides easy steps on how to integrate martech successfully to drive measurable results.

[MarTech Template](#)



Gen AI For ABM

How to Use This:

This template is designed to integrate generative AI tools into your ABM strategy seamlessly. Use it to create account-specific messaging, generate dynamic ad copies, and draft personalized content at scale. It also helps in identifying patterns and insights from your target accounts using AI-driven data analysis. Leverage this template to streamline repetitive tasks, enhance your creative process, and focus on building deeper, data-driven engagement with your prospects.

[Gen AI 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 they 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, and we will be happy to help.

Reach out to us:

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